

McGill



Darwin Manual

Animal Buyer Office Users

McGill University

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Introduction

This documentation is for the Animal Buyers who will be:

- Setting up facility information (room, contacts, per diems)
- Initiating the animal orders and/or or processing the animal order
- Printing cage cards
- Processing the received shipments
- Performing requisition search and reports
- Performing protocol search and reports
- Setting up and transferring accounts

Applications

Two applications are being used for the animal order process: **Darwin Web** and **Darwin Desktop**. The Animal Buyer will be using both applications: Darwin web and Darwin Desktop application.

Darwin web-based application is used for creating and modifying animal orders as well as processing received shipments and generating reports. The Animal Buyer will be using the Darwin Desktop for printing cage cards as well as making adjustments to the animal orders. (See [Cage Cards Management - Darwin Desktop](#))

Login to Darwin Web

To login to Darwin web-based application:

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and type the following URL: <https://darwin.research.mcgill.ca> .
2. The Darwin login screen opens. Enter your *McGill Short Username and McGill Password in the corresponding fields.
3. Click the login to Darwin button



Welcome to **Darwin**, your access to Animal Care Committee and animal care information and management system.

Log in using the McGill Short Username (such as jdoe or jsmith4):

Short Username:

McGill Password:

[For questions, assistance and requests, contact us.](#)

 **McGill**



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*McGill Short Username and McGill Password: for more information, go to <http://kb.mcgill.ca/kb/?ArticleId=1025>

For non-McGill Staff: they will be issued a McGill Short Username.

Can't login? Contact Darwin Support by completing the Web Form at <http://www.mcgill.ca/research/researchers/compliance/animal/software/webform>

Darwin Web Application Home Page

Upon successful login, the Darwin **Home Page** opens.

When you login to the Darwin Web Application, the Darwin Web Application **Home Page** opens.

In the following example, the **ABUYER (Animal Buyer)** user's home page is displayed. If you are assigned to another security role, the home page may differ depending on options that are assigned to your security role.



Tip

If you have more than one security role, and are on more than one site, please ensure that you are in the ABUYER (Animal Buyer) role on the site in which you are working.

Home Page

Abuyer, Rvh

RVH: ABUYER

SIGN OUT

REFRESH

01/10/2013

Alerts...

Standing Orders Due

Orders Receipts Due

Orders Deliveries

Orders Placed

Protocols

Animal Orders

Cage Card Management

Financials

Sites

RVH FAC

MAC FAC

Roles

ASUPER

Change Password

ALERTS -- ANIMAL STANDING ORDERS DUE

Next Plan #	Order #	PO Number	Principal Investigator	Expiration Date	SO Expire Date	Description	Expected Date	Protocol No	SO Status	Other Source	Requestor	Vendor Name
2	V0027261		Investigator1, Rvh	12/01/2015	03/29/2013		01/16/2013	2012-7267	Active		Investigator1, Rvh	Charles River Laboratories

ALERTS -- ANIMAL RECEIPTS DUE

Source	Vendor	Other Source	Vendor Loc	Expected	Order #	Item #	Qty	Species	Strain	Age	Weight	Sex	Location	Room	Per Diem
Vendor Purchases	Charles River Laboratories			11/09/2012	V0027258	1	10	Rats	Zucker			M	RVH Animal Facility-TEST		Test Rat Conventional Cage
Vendor Purchases	Charles River Laboratories			11/29/2012	V0027001	2	20	Rats	Zucker			F	RVH Animal Facility-TEST		Rat conventional
Vendor Purchases	Harlan			01/09/2013	V0027216	1	5	Mice	CS7			M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage
Vendor Purchases	Charles River Laboratories			01/10/2013	V0027211-1	1	8	Mice	wild-type	10 weeks	10-15g	M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage
Vendor Purchases	Charles River Laboratories			01/10/2013	V0027224	1	11	Mice	wild type		10-15g	M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage

ALERTS -- DELIVERY SCHEDULE

Expected	Source	Vendor	Other Source	Vendor Loc	Order #	Item #	Requestor	Phone	Qty	Species	Strain	Age	Weight	Sex	Location	Room	Per Diem	Placed On
01/14/2013	Vendor Purchases	Charles River Laboratories			V0027222-1	1	Abuyer, Rvh	111-1111	9	Rats	Zucker		200g	M	RVH Animal Facility-TEST	TestB	Test Rat Conventional Cage	01/07/2013

ALERTS -- PLACED ORDERS

Source	Vendor	Other Source	Order #	Order Date	Placed On	Species	Requestor	Protocol
Vendor Purchases	Charles River Laboratories		V0027258	11/08/2012	11/08/2012	Rats	Flinstone, Fred	2012-7253
Vendor Purchases	Charles River Laboratories		V0027001	11/28/2012	11/28/2012	Rats	Flinstone, Fred	2012-7253
Vendor Purchases	Charles River Laboratories		V0027211-1	01/07/2013	01/07/2013	Mice	Investigator1, Rvh	2012-7267
Vendor Purchases	Charles River Laboratories		V0027222-1	01/07/2013	01/07/2013	Rats	Abuyer, Rvh	2013-7276
Vendor Purchases	Charles River Laboratories		V0027024	01/07/2013	01/07/2013	Mice	Investigator1, Rvh	2013-7276
Vendor Purchases	Harlan		V0027216	12/14/2012	01/08/2013	Mice	Morocutti, Bruna	2012-7256

PROTOCOLS

[Protocol Search](#)
[View Protocol Species Usage Register](#)
[Protocol Reports](#)
[Compliance Reports](#)

ANIMAL ORDERS

[Create a New Animal Order](#)
[Create a New Standing Order](#)
[Requisition Reports](#)
[Vendor Reports](#)
[Create a New Animal Order From Template](#)
[Auto Receive Animal Shipments](#)
[Requisition Search](#)
[Setup Vendor](#)
[Setup Species](#)
[Setup Facilities & Rooms](#)
[Standing Order Search](#)
[Animal Receipt Reports](#)
[Reconcile Vendor Invoices](#)

CAGE CARD MANAGEMENT

[Cage Card Setup](#)

FINANCIALS

[Setup Accounts](#)
[Transfer Accounts](#)

Home Page Sections

The Darwin Web Application **Home Page** consists of the following sections;

- **Grey stripe across the top of the window;**
- **Table of contents, at the left of the home page**
- **Applications and Options area.**

Grey Information Bar

Your current location, your name, your security role, the SIGN OUT and the REFRESH link buttons, and the current date.

Home Page	Abuyer, Rvh	RVH: ABUYER	SIGN OUT	REFRESH	01/04/2013
-----------	-------------	-------------	--------------------------	-------------------------	------------

In the example given, the current location is **Home Page**, the office user's name is **Abuyer, Rvh**, the security role is **ABUYER**, and the current date is **January 4, 2013**.

Table of Contents (TOC)

Clicking an item in the **TOC** takes you to the corresponding portion of your home page.

Alerts...
Standing Orders: Due
Orders: Receipts Due
Orders: Deliveries
Orders: Placed
Protocols
Animal Orders
Cage Card Management
Financials
Sites
RVH FACC
MAC FACC
Roles
ASUPER
Change Password

Table of contents (TOC) is located on the left hand side of the home page.

When you click on an item in the TOC, you will proceed to the corresponding section of your home page.

The TOC consists of 4 main sections:

Alerts:

In the example given above, on Rvh Abuyer's home page, the following alerts are displayed:

- Alerts – ANIMAL STANDING ORDERS DUE
- Alerts – ANIMAL RECEIPTS DUE
- Alerts – DELIVERY SCHEDULE
- Alerts – PLACED ORDERS

Options:

- Protocols
- Animal Orders
- Cage Card Management
- Financials

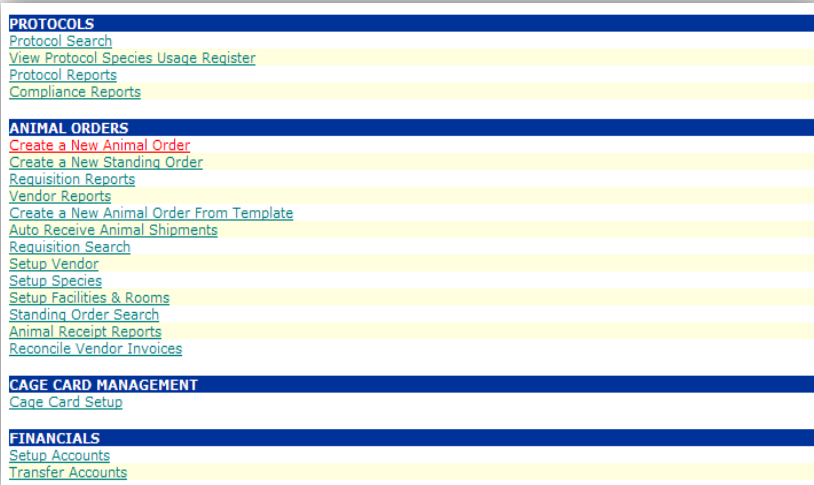
Sites: section appears if you belong to more than one site.

Roles: section appears if you have permissions to more than one role. It displays all roles assigned to you. If you are assigned only one role, you will not see the Roles in the TOC. In the given example, Rvh Abuyer is assigned two roles: the Animal Buyer (ABUYER, his current role) and the Animal Supervisor (ASUPER) role.

Change Password: This is an inactive function. For more information about the McGill short username and McGill Password, go to <http://kb.mcgill.ca/kb/?ArticleId=1025>

Applications and Options Area

The image below illustrates what the Applications and Options area looks like.



The blue stripes – **Protocols**, **Animal Orders**, **Cage Card Management**, and **Financials** are the various applications, under which a user can have some or all of the related options assigned by the Darwin Web Application administrator in the Darwin Web Expert application.

Introduction to Shared Housing

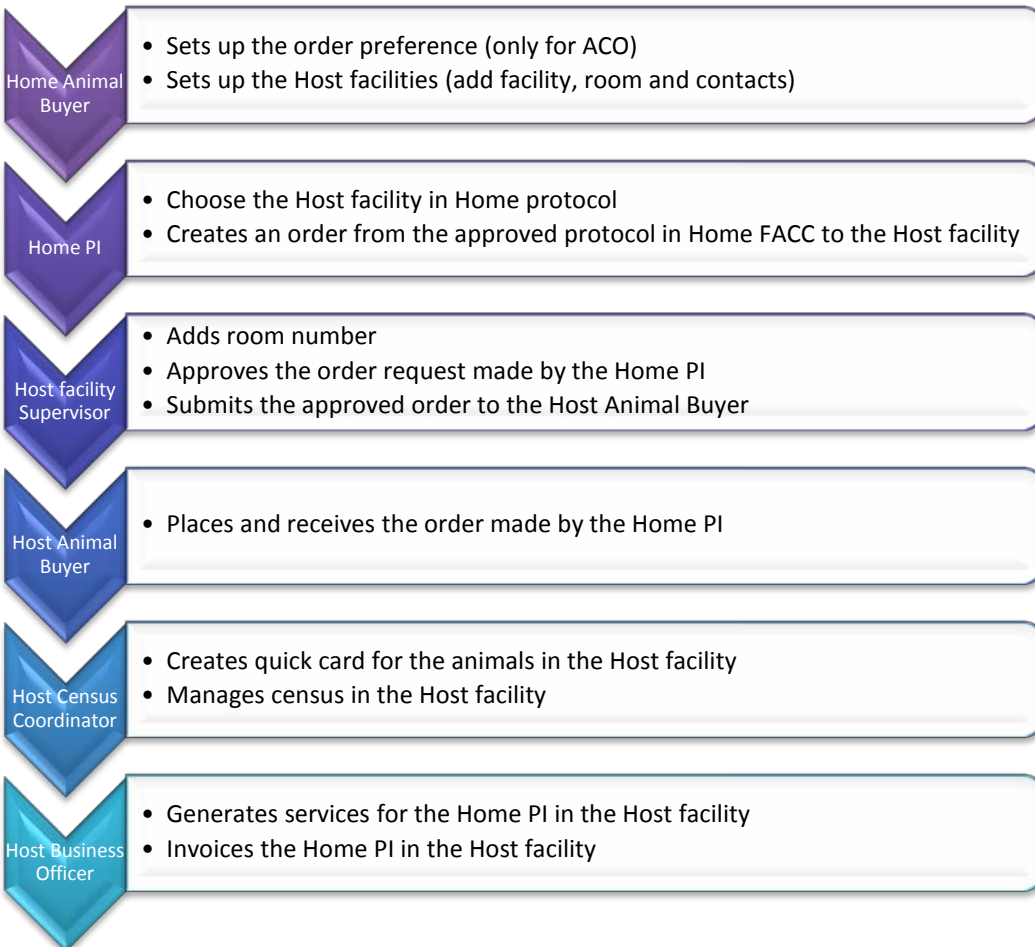
Shared housing occurs when a PI belongs to a Home FACC (Site) and wants to house animal in a Host(s) facilities. The shared housing process involves many people in this order;



Note

Defining “**Home**” and “**Host**” role in this document:

- **Home** is where the protocol originates.
- **Host** refers to the shared housing.



Shared Housing is a customized function. Certain applications may differ from the usual Darwin process. Customized instructions are specified in the applicable sections.

Setup Local Lists – Setup Vendor

This is a Global Setting reserved for Animal Compliance office ONLY. For modifications to this list, Office Users must submit their request to the ACO by email at darwin@mcgill.ca

Setup Local Lists – Species Setup

Species Group List

This is a Global Setting reserved for Animal Compliance office ONLY. For modifications to this list, please submit your request to the ACO by email at darwin@mcgill.ca

Species List

This is a Global Setting reserved for Animal Compliance office ONLY. For modifications to this list, please submit your request to the ACO by email at darwin@mcgill.ca

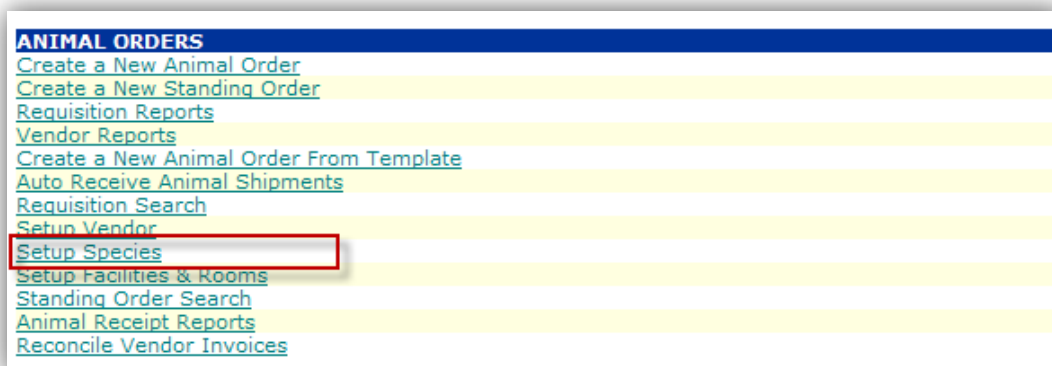
Strain List

This is a Global Setting reserved for Animal Compliance office ONLY. For modifications to this list, please submit your request to the ACO by email at darwin@mcgill.ca

Per Diem List

To get to the **Per Diems** page:

1. Select the **Setup Species** option is displayed in the **Animal Orders** section of your [Home Page](#)



2. Click the **Continue** button on the **Species Setup Introduction** page

Species Setup Introduction

Welcome to eSirius species setup.

[Continue](#)

[Return To Home Page](#)

- Open the Per Diem List page by selecting the **Per Diem List** option in the **Table of Contents** on the **Species Group List** page

[Species Group List](#)
[Species List](#)
[Strain List](#)
[Per Diem List](#)

Species Group List

Species groups provide a means to classify multiple species for reporting purposes. For example a species group 'rodents' would comprise rats, mice, gerbils, etc.

Group Id	Group Name
AMPH	Amphibians
BRDD	Birds - Domestic
K9	Canines
CEPH	Cephalopods
FARM	Farm Animals
FELN	Felines
FISH	Fish
INV	Invertebrates
LAGO	Lagomorphs
MARI	Marine Animals
MARS	Marsupials
MUST	Mustelidae
NHP	Non-human Primates
REPT	Reptiles
RDNT	Rodents
WILD	Wild Species

[Add Species Group](#)

[Next](#) [Finish Later](#)

- The **Per Diem List** Page opens.

Per Diem List

Group	Species	PD Code	PD Description	PD Rate	Effective Date	Discontinued?
Canines	Dogs	0206	Dog Cage External	12.0000	12/09/2011	No
Canines	Dogs	0198	Dog cage	7.0000	04/01/2012	No
Farm Animals	Swine	0200	Pig cage	6.0000	04/01/2012	No
Lagomorphs	Rabbits	0199	Rabbit cage	2.0000	04/01/2012	No
Rodents	Chinchillas	0208	Chinchilla Conventional Cage	2.0000	04/01/2012	No
Rodents	Gerbils	0209	Gerbil Conventional Cage	0.5000	04/01/2012	No
Rodents	Guinea Pigs	0207	Guinea Pig Conventional Cage	0.8000	04/01/2012	No
Rodents	Mice	0201	Mouse Cage Biocontainment BSL3	1.2000	04/01/2012	No
Rodents	Mice	0204	Mouse biocontainment level 2	1.1000	04/01/2012	No
Rodents	Mice	0202	Mouse conventional	0.6000	04/01/2012	No
Rodents	Mice	0210	Mouse quarantine	1.1000	04/01/2012	No
Rodents	Mice	0203	Mouse sterile	0.7500	04/01/2012	No
Rodents	Mice	0309	Test Mouse BSL2 cage	2.2500	//	No
Rodents	Mice	0308	Test Mouse Conventional Cage	1.5000	//	No
Rodents	Rats	0205	Rat conventional	0.7000	04/01/2012	No
Rodents	Rats	0297	Rat-Biocontainment Level 2	1.4500	04/01/2012	No
Rodents	Rats	0310	Test Rat Conventional Cage	3.0000	//	No

[Add Per Diem](#)

With the **Per Diem List** page, you describe various per diems associated with each species. As with strains, the associated per diems are available when the investigator is entering an animal order request.

To Edit a Per Diem

1. Click the Per Diem description link on the **Per Diem List** page. The **Per Diem Info** page appears.

Per Diem Info

Add or edit species per diem. Begin with a per diem identifier of up to four characters. Information about each per diem including species, rate, and effective date is stored here.

Per Diem Code	0308
Species Name	Mice
Per Diem Description	Test Mouse Conventional Cage *
Per Diem Rate	1.5000
Rate Effective Date	
Deleted Flag	<input type="checkbox"/>

Selecting the Deleted Flag will hide the Per Diem from selection pick lists various applications such as Animal Orders

Save Changes Cancel Changes Clear Form

2. Make your changes.
3. Click **Save Changes**.

To Add a New Per Diem:

1. Click the **Add Per Diem** button on the **Per Diem List** page.
2. Follow the on-page instructions.
3. Click Save Changes.

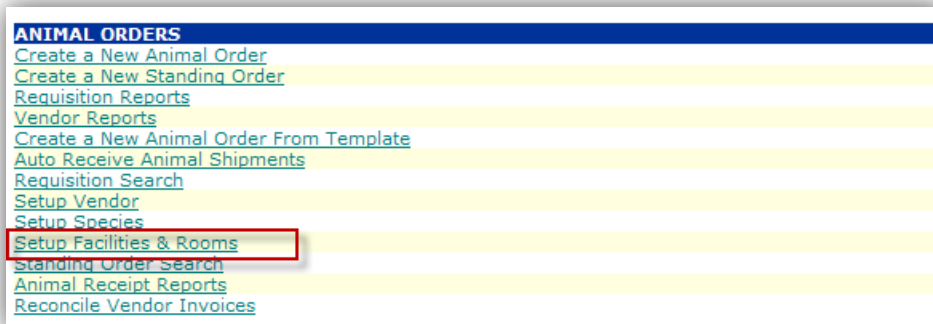
Setup Per Diems for Shared Housing

Note

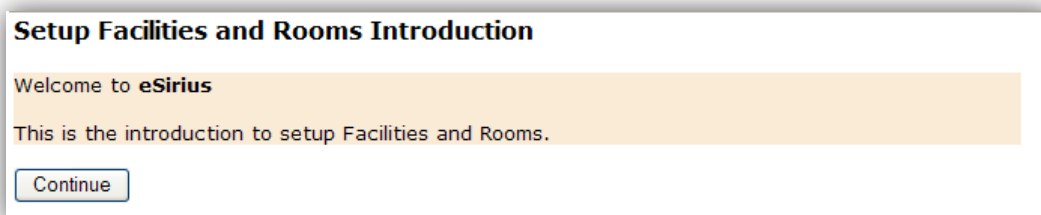
The Per Diem Group for the Host facility must also exist in the Home FACC Per Diem List

Setup Local Lists – Setup Facilities and Rooms

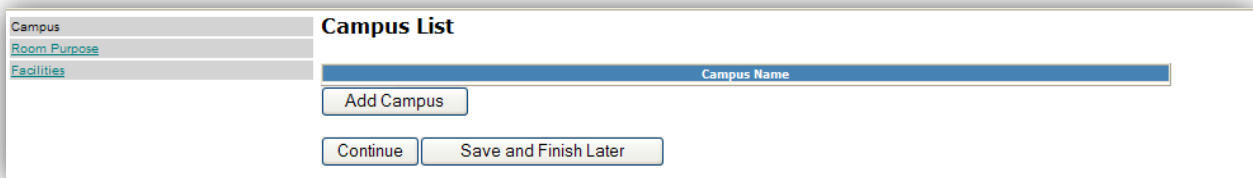
The **Setup Facilities and Rooms** option is displayed in the **Animal Orders** section of the Home page



Select **Setup Facilities & Rooms** to open the **Setup Facilities and Rooms Introduction** page.



Click **Continue** to open the **Campus List** page.



A. Campus

This feature is not applicable.

B. Room Purpose

This is a Global Setting reserved for Animal Compliance office ONLY. For modifications to this list, please submit your request to the ACO by email at darwin@mcgill.ca

C. Facilities

Add/ Edit a Facility

This feature is managed by the Animal Compliance office **ONLY**. To add or edit a facility, please submit your request by e-mail at darwin@mcgill.ca

Facility Rooms

This is a master list of Rooms assigned to a facility.

- In addition to the Office User setups, the list is also populated with protocol information added by the PI when rooms are not available on the pick list for selection. By default, these rooms are identified with a Temporary Flag in the Room Setup profile and will not be available in subsequent protocol pick lists. The Temporary Flag must be unselected to define that the room was created by the Office User (ABUYER)
- Room annotation must be alpha-numerical only. It must NOT include spaces or punctuation as this will interfere with the barcode scanning.
- To facilitate procedure room selection for the PI, it is recommended to include a description as a suffix to the number for rooms which are
 - Exclusively procedure rooms. (e.g. *A76procedure*)
 - Specialized housing rooms such as Biocontainment, Radiation, etc. (e.g. *C67biohazard*)

To Open the Room List

1. Open the **Facilities List** page by selecting the **Facilities** option in the **Table of Contents** from the **Campus List page**.
2. Select the radio button of the Facility corresponding to the Room
3. Click on Edit Rooms.

Facilities List

Select	Facility Code	Facility Name	Campus Name	Barcode	Deleted
<input type="radio"/>	DOWGEN4RVH	Genome Animal Facility used by RVH		No	No
<input type="radio"/>	DOWDUFF4RVH	Lyman Duff Animal Facility used by RVH		No	No
<input type="radio"/>	MACSWI4RVH	MAC Swine Complex used by RVH		No	No
<input type="radio"/>	MCLAF	MCL Animal Facility		Yes	No
<input type="radio"/>	MCLLAB	MCL Research Lab		No	No
<input type="radio"/>	MGHBSL34RVH	MGH BSL3 Facility used by RVH		No	No
<input type="radio"/>	MGHLAF4RVH	MGH Large Animal Facility used by RVH		No	No
<input type="radio"/>	MGHROD4RVH	MGH Rodent Facility used by RVH		No	No
<input type="radio"/>	DOWMMB4RVH	McIntyre Animal Facility used by RVH		No	No
<input type="radio"/>	OFFSITE1	Off Site Procedure Location (specify bldg/room below)		No	No
<input type="radio"/>	RVHCNTRY	Other Country		No	No
<input checked="" type="radio"/>	RVHAF	RVH Animal Facility-TEST		Yes	No
<input type="radio"/>	RVHLAB	RVH Research Lab		No	No
<input type="radio"/>	GENOF4RVH	X-Deleted GENOF4RVH		No	Yes

- The **Room List** page opens

Rooms List

Facility Name: RVH Animal Facility-TEST			
Select	Room No	Floor	Hide Room Flag
<input type="radio"/>	TBD		No
<input type="radio"/>	TestA	Level 2	No
<input type="radio"/>	TestB	Level 2	No
<input type="radio"/>	TestC	Level 1	Yes
<input type="radio"/>	TestCbs12		No
<input type="radio"/>	UN-ASSIGNED		No

To Add a New Room to a New Home Facility

- From the **Rooms List** page, click on **Add Room**. The Room Information page opens.

Room Information

Facility Name	RVH Animal Facility-TEST
Facility Room Number	<input type="text"/> *
Floor	<input type="text"/>
Capacity Factor	<input type="text" value="0.0000"/>
Hide Room Flag	<input type="checkbox"/>
Temp Room Flag	<input type="checkbox"/>
Purpose	
<input type="text"/>	<input type="button" value="v"/>
<input type="text"/>	<input type="button" value="v"/>
<input type="text"/>	<input type="button" value="v"/>
<input type="button" value="Add Room Purpose"/>	
<input type="button" value="Save and Continue"/> <input type="button" value="Clear Form"/> <input type="button" value="Cancel Changes"/>	

2. Enter the **Room number** (no punctuation nor spaces), and **Floor**

Note

This is a master list of Rooms assigned to a facility. The list is also populated with protocol information added by the PI when procedure rooms are not available on the pick list for selection.

- Unselect the Temporary flag checkbox to define that it is authored by the Office User

Note

Room Description must be alpha-numerical only. It must **NOT** include **spaces** or **punctuation** as this will interfere with the barcode scanning.

3. Temporary Flag:

In addition to the Office User setups, the Room list is also populated with protocol information added by the PI when procedure rooms are not available on the pick list for selection. By default, these rooms are identified with a **Temporary Flag** in the Room Setup profile and will not be available in subsequent protocol pick lists. The **Temporary Flag** must be unselected to define that the room was created by the Office User (ABUYER)

Unselect the Temporary Flag to allow the room to display in application pick lists. This also serves to indicate that the room is valid and has been approved by the ABUYER.

Room Information

Facility Name	RVH Animal Facility-TEST		
Facility Room Number	TestD	*	
Floor			
Capacity Factor	0.0000		
Hide Room Flag	<input type="checkbox"/>		
Temp Room Flag	<input checked="" type="checkbox"/>		
Purpose			
	▼		
	▼		
	▼		
Add Room Purpose			
Save and Continue		Clear Form	Cancel Changes

- Hide Room Flag: Select the Hide Room Flag to remove the room from the application pick lists.

Room Information

Facility Name	RVH Animal Facility-TEST		
Facility Room Number	TestD	*	
Floor			
Capacity Factor	0.0000		
Hide Room Flag	<input checked="" type="checkbox"/>		
Temp Room Flag	<input type="checkbox"/>		
Purpose			
	▼		
	▼		
	▼		
Add Room Purpose			
Save and Continue		Clear Form	Cancel Changes

- Select the **Purpose** for this room from the drop-down list

Room Information	
Facility Name	RVH Animal Facility-TEST
Facility Room Number	<input type="text"/> *
Floor	<input type="text"/>
Capacity Factor	<input type="text" value="0.0000"/>
Hide Room Flag	<input type="checkbox"/>
Purpose	
<div> <div>▼</div> <div> Animal Housing Behavioral Room Procedures Room Surgery Room </div> </div>	<input type="text"/>

Animal Housing: The Room will be available for selection in the

- Housing section of the protocol
- Animal Order Application

Behavioral Room: The Room will be available for selection in the procedure section of the protocol ONLY.

Procedures Room: The Room will be available for selection in the procedure section of the protocol ONLY.

Surgery Room: The Room will be available for selection in the procedure section of the protocol ONLY.

Note

To facilitate procedure room selection for the PI, it is recommended to include a description as a suffix to the number for rooms which are exclusively procedure rooms.

For example; *A76procedure* **(REMINDER:** Do not include spaces)

6. Click on

- **Save & Continue** to save the information
- **Clear Form** to refresh the page
- **Cancel Changes** will cancel any changes and return to the Room List page

To Add a New Room to a Host Facility for Shared Housing

This feature is managed by the Animal Compliance office at the creation of the Shared Housing Facility.

Further addition or modification of a “shared housing Room is not applicable given that the “TBD” default room number is a virtual process performed in the Home site. Actual room numbers are adjusted further on in the animal order process.

To Edit Existing Room Information

1. From the **Rooms List** page, click on the room link.

Select	Room No	Floor	Hide Room Flag
<input type="radio"/>	TBD		No
<input type="radio"/>	TestA	Level 2	No
<input type="radio"/>	TestB	Level 2	No
<input type="radio"/>	TestC	Level 1	Yes
<input type="radio"/>	TestCbs12		No
<input type="radio"/>	UN-ASSIGNED		No

2. The **Room Information** page opens.

Facility Name
RVH Animal Facility-TEST

Facility Room Number
TestA

Floor
Level 2

Capacity Factor
0.0000

Hide Room Flag
<input type="checkbox"/>

Temp Room Flag
<input type="checkbox"/>

Purpose
Animal Housing

Hide Room Flag: Rooms cannot be deleted from the system since they may be linked to historical data. If you wish to remove a room for selection in the drop -down lists, select the Hide room Flag checkbox to hide it from selection but it will remain in the master list.

Temporary Room Flag: The master list is populated by all rooms created in the system, including rooms created by the PI when completing the protocol. By default, the room is flagged as

“temporary” and will not be available for selection in subsequent protocols. The Temp Room Flag serves as an indicator to identify the author of the room. Animal facility Rooms must **NOT** be flagged as Temporary; otherwise it will be removed from the drop-down lists in the various applications.

3. Make the appropriate changes and then click **Save and Continue**.

Note

The set up information cannot be deleted and can only be hidden from the selection lists in the various applications in order to safeguard legacy data it may be linked to

Facility Contacts

In order to view animal order alerts, receive e-mail notifications (where applicable) and cage card management, the **ASUPER**, **ACCOORD**, and **ABUYER** must be assigned to the facility.

Animal Order and cage Card Information will be accessible to the office users *ONLY* for the facility to which they are listed.

To receive e-mail notifications, the Office user must be listed on the Facility Contact list *AND* assigned the security role

The ABUYER and ASUPER security roles are fundamental for processing Animal Orders. Only a single ABUYER and at least one ASUPER must be assigned to a facility.

It is recommended to include backup Office Users in the Facility Contact list without assigning the security role. Alerts will not be automatically redirected to newly added contacts.

Note

To add security role. submit your request to darwin@mcgill.ca

Setup Facility Contacts

1. On the **Facilities List** page, select the appropriate facility and click the **Edit Facility Contacts** button.

Facilities List

Select	Facility Code	Facility Name	Campus Name	Barcode	Deleted
<input type="radio"/>	DOWGEN4RVH	Genome Animal Facility used by RVH		No	No
<input type="radio"/>	DOWDUFF4RVH	Lyman Duff Animal Facility used by RVH		No	No
<input type="radio"/>	MACSWI4RVH	MAC Swine Complex used by RVH		No	No
<input type="radio"/>	MCLAF	MCL Animal Facility		Yes	No
<input type="radio"/>	MCLLAB	MCL Research Lab		No	No
<input type="radio"/>	MGHBSL34RVH	MGH BSL3 Facility used by RVH		No	No
<input type="radio"/>	MGHLAF4RVH	MGH Large Animal Facility used by RVH		No	No
<input type="radio"/>	MGHROD4RVH	MGH Rodent Facility used by RVH		No	No
<input type="radio"/>	DOWMMB4RVH	McIntyre Animal Facility used by RVH		No	No
<input type="radio"/>	OFFSITE1	Off Site Procedure Location (specify bldg/room below)		No	No
<input type="radio"/>	RVHCNTRY	Other Country		No	No
<input checked="" type="radio"/>	RVHAF	RVH Animal Facility-TEST		Yes	No
<input type="radio"/>	RVHLAB	RVH Research Lab		No	No
<input type="radio"/>	GENOF4RVH	X-Deleted GENOF4RVH		No	Yes

The **Facility Contacts List** page opens.

- Click **Add Facility Contact** on the **Facility Contacts List** page. The **Facility Contacts > Name Search** page opens.

Facility Contacts List

Facility Name: RVH Animal Facility-TEST								
Select	Email	Name	Fax	Role	Phone + Ext	eSirius ID	eSirius Role(s)	Status
<input type="checkbox"/>	rvh.accoord@mcgill.ca	Accoord, Rvh		Department Chair	4508889999x78945	RACCOORD	ACCOORD	Active
<input type="checkbox"/>	rvh.buyer@mcgill.ca	Abuyer, Rvh		Animal Buyer Staff	111-1111	RABUYER	ABUYER	Active

- Enter any combination of name filters and click **Search**.

Facility Contacts > Name Search

Enter any combination of name filters and click Search.

Facility Name: RVH Animal Facility-TEST	
First Name	<input type="text" value="r"/>
Mid Initial	<input type="text" value=""/>
Last Name	<input type="text" value="a"/>

- The **Name Search Results** List page opens, with the list of the names meeting your search criteria displayed.

Name Search Results List

Choose desired person from search results list

Facility Name: RVH Animal Facility-TEST

Select	Full Name	Contact ID	Business Role	FACC	Email	Phone + Ext
<input checked="" type="radio"/>	Abuyer, Rvh		Animal Buyer Staff	RVH-FACC	rvhbuyer@mcgill.ca	111-1111
<input type="radio"/>	Accoord, Rvh		Census Coordinator	RVH-FACC	rvh.acoord@mcgill.ca	4508889999x78945
<input type="radio"/>	Asuper, Rvh		Animal Facility Supervisor	RVH-FACC	rvh.asuper@mcgill.ca	5145554444x35698

- Select the appropriate radio button and click **Add Selected Contact**. The **Facility Contact Information** page opens.

Facility Contact Information

Facility Name: RVH Animal Facility-TEST

First Name: Rvh

Middle Initial:

Last Name: Abuyer

Role: Animal Buyer Staff

Organization/Department: RVH-FACC

Campus:

Phone + Ext: 111-1111

Fax:

Emergency Phone:

Home Phone:

Cell Phone:

Pager:

Email Id: rvhbuyer@mcgill.ca

eSirius User Id: RABUYER

Choose eSirius Role(s): ☒ ABUYER ☐ ASUPER

Status: Active

- Complete the Facility Contact Information page. Assign the **eSirius role(s)** by selecting the appropriate check boxes.

Facility Contact Information

Facility Name	RVH Animal Facility-TEST
First Name	Rvh
Middle Initial	
Last Name	Abuyer
Role	Animal Buyer Staff
Organization/Department	RVH-FACC
Campus	
Phone + Ext	111-1111
Fax	
Emergency Phone	
Home Phone	
Cell Phone	
Pager	
Email Id	rvhbuyer@mcgill.ca
eSirius User Id	RABUYER
Choose eSirius Role(s)	<input checked="" type="checkbox"/> ABUYER <input type="checkbox"/> ASUPER
Status	Active

Assign Security Role

Save and Continue Clear Form Return to Facility Contacts List

Note

An individual can be assigned multiple security roles

Only the security roles to which the person has permissions will be displayed for selection. In the example given, *RVH Abuyer* has permissions to the ABUYER and ASUPER security roles and not the ACCOORD role.

7. Ensure the Status is **Active**
8. Click **Save and Continue**. The **Facility Contacts List** page opens.

Facility Contacts List

Facility Name: RVH Animal Facility-TEST								
Select	Email	Name	Fax	Role	Phone + Ext	eSirius ID	eSirius Role(s)	Status
<input type="checkbox"/>	rvh.asuper@mcgill.ca	Asuper, Rvh		Animal Facility Supervisor	5145554444x35698	RASUPER	ASUPER	Active
<input type="checkbox"/>	rvh.accoord@mcgill.ca	Accoord, Rvh		Department Chair	4508889999x78945	RACCOORD	ACCOORD	Active
<input type="checkbox"/>	rvhbuyer@mcgill.ca	Abuyer, Rvh		Animal Buyer Staff	111-1111	RABUYER	ABUYER	Active

Add Facility Contact Remove Selected Contact

Return to Facility List

In the given example, *Rvh Asuper* (ASUPER), *Rvh Accord* (ACCOORD) and *Rvh Abuyer* (ABUYER) have been added as the contact for the *Rvh Animal facility-TEST*.

9. Click **Return to Facility List** to return to the Facilities List page.

Setup Facility Contacts for Shared Housing

In the example used, the MAC FACC is the Home Site and the RVH Animal Facility – Test is the Host Facility.

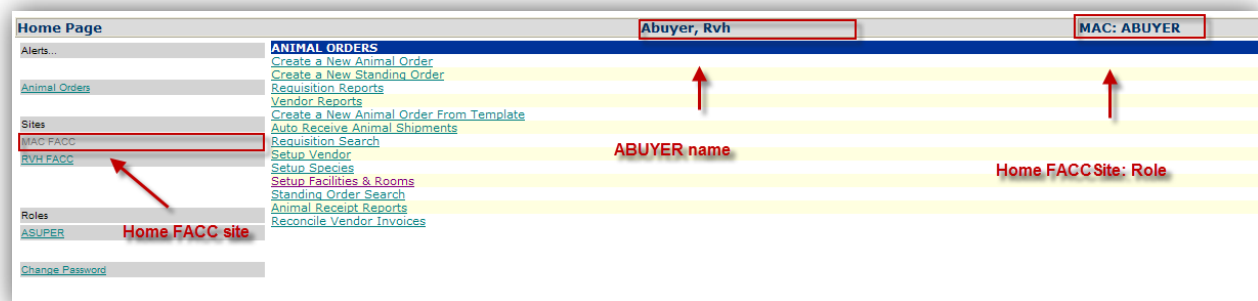
The Host Facility Animal Buyer (MAC) must be given security role in the Home (RVH) site as ABUYER.

- A request for ABUYER security role permissions to the home site must be submitted to the Animal Compliance Office (ACO) by e-mail at darwin@mcgill.ca.
- The ACO Office will add the Home (RVH) site to the Host (MAC) Animal Buyer's and Facility Supervisor's Darwin user account, and choose the security role of ABUYER and ASUPER.
- ACO will customize the ABUYER role allowing only the animal order and cage card management permissions (remove protocol and financial attributes)

Note

Office User Security roles permissions for Shared Housing are limited to Animal acquisition and requisition attributes only. Protocol and Financial Information for the home site is not accessible

1. As the **Host Facility ABUYER** (*Rvh Abuyer*), select the Home FACC site (*MAC*) from the Table of Contents.



2. Follow setup instructions as described in [Facility Contacts](#) section. For the **Facility List** page select the **Host Facility's Shared Housing** name (e.g. *RVH Animal facility used by MAC – TEST*)

Note

The Host Animal Buyer and Animal Facility Supervisor will only be able to view the alerts pertaining to the shared housing host facility in the Home FACC site's home page.

To view the alerts for the shared housing, the Host Animal Buyer must switch to the Home site from the Table of Contents (TOC) of Darwin home Page.

The Facility Contact list for the Shared Housing site (e.g. *RVH Animal Facility – Test used by MAC FACC* in the MAC FACC site) should be a replica of the original Animal Facility. (e.g. *RVH Animal Facility – Test* in the RVH FACC site)

Editing Facility Contacts

1. On the **Facilities List** page, select the appropriate facility and click the **Edit Facility Contacts** button.

Facilities List

Select	Facility Code	Facility Name	Campus Name	Barcode	Deleted
<input type="radio"/>	DOWGEN4RVH	Genome Animal Facility used by RVH		No	No
<input type="radio"/>	DOWDUFF4RVH	Lyman Duff Animal Facility used by RVH		No	No
<input type="radio"/>	MACSWI4RVH	MAC Swine Complex used by RVH		No	No
<input type="radio"/>	MCLAF	MCL Animal Facility		Yes	No
<input type="radio"/>	MCLLAB	MCL Research Lab		No	No
<input type="radio"/>	MGHBSL34RVH	MGH BSL3 Facility used by RVH		No	No
<input type="radio"/>	MGHLAF4RVH	MGH Large Animal Facility used by RVH		No	No
<input type="radio"/>	MGHROD4RVH	MGH Rodent Facility used by RVH		No	No
<input type="radio"/>	DOWMMB4RVH	McIntyre Animal Facility used by RVH		No	No
<input type="radio"/>	OFFSITE1	Off Site Procedure Location (specify bldg/room below)		No	No
<input type="radio"/>	RVHCNTRY	Other Country		No	No
<input checked="" type="radio"/>	RVHAF	RVH Animal Facility-TEST		Yes	No
<input type="radio"/>	RVHLAB	RVH Research Lab		No	No
<input type="radio"/>	GENOF4RVH	X-Deleted GENOF4RVH		No	Yes

The **Facility Contacts List** page opens.

2. **To remove a Contact:** select the appropriate check box and click **Remove Selected Contact**

To edit a contact profile: click on the name link and make the required changes

Facility Contacts List

Facility Name								RVH Animal Facility-TEST
Select	Email	Name	Fax	Role	Phone + Ext	eSirius ID	eSirius Role(s)	Status
<input type="checkbox"/>	rvh.asuper@mcgill.ca	Asuper, Rvh		Animal Facility Supervisor	5145554444x35698	RASUPER	ASUPER	Active
<input type="checkbox"/>	rvh.accoord@mcgill.ca	Accoord, Rvh		Department Chair	4508889999x78945	RACCOORD	ACCOORD	Active
<input type="checkbox"/>	rvhbuyer@mcgill.ca	Abuyer, Rvh		Animal Buyer Staff	111-1111	RABUYER	ABUYER	Active

3. Click **Save and Continue**. The **Facility Contacts List** page opens.
4. Click **Return to Facility List** to return to the Facilities List page.

Animal Orders

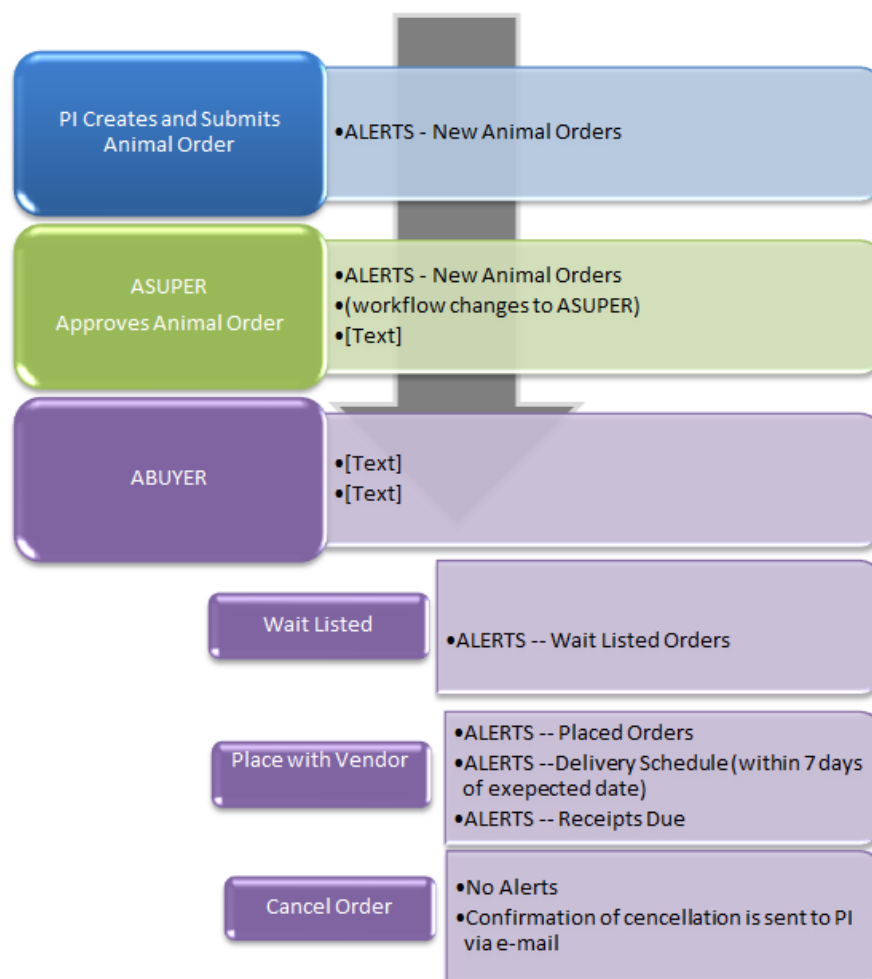
The animal order can be created either by the PI, the PI group's member or the Animal Buyer. The workflow will be slightly different depending on who initiates the order.

Animal order requests can be submitted to the Animal Facility only for an approved protocol and if the animal usage has not exceeded the authorized amount.

This feature only applies to orders deriving from an approved vendor source:

- **Non-Commercial Sources:** customary processes are maintained for animal acquisition requests from non-commercial or non-approved vendor sources.
- **Wildlife:** Does not apply to Darwin Animal Orders. The use of field animals will be reported at the renewal phase of the protocol.

Workflow Process for Animal Order



Create Animal Order Request

A. PI creates and submits an order request

When the PI begins the animal order workflow,

- a. PI creates and submits an order request.
- b. Facility Supervisor adds or edits the building room #, if needed, and approves it.
- c. Animal Buyer processes the order.

See [ABUYER Creates an Order Request](#) if the Animal Buyer is initiating the animal order workflow.

After the PI creates and submits an order request, the system will assign an order number. The **Alerts -- New Animal Orders** section of the Darwin home page notifies the PI, Facility Supervisor, and Animal Buyer of the new order and keeps them informed as to the order workflow status. The workflow status is created and displayed **ONLY** when a PI starts an order. It will not display if the order is placed by the Animal Buyer.

In the example given below, the order has been created by the PI, but not yet approved by the Facility Supervisor (the workflow status says Facility Supervisor).

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	Investigator1, Rvh	2013-7276	Mice	Animal Buyer	
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

When the order is approved by the Facility Supervisor, its workflow status is changed to Animal Buyer.

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	Investigator1, Rvh	2013-7276	Mice	Animal Buyer	
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

When the Animal Buyer places the order with the vendor, the order moves to **Alerts -- Placed Animal Orders**. It will also appear in the **Alert--Delivery Schedule** if within 7 days of the delivery date. On the delivery date, they automatically move to the **Alerts -- Animal Receipts Due** section. When the order is received, it no longer appears in the alerts.

ALERTS -- NEW ANIMAL ORDERS													
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At				
Vendor Purchases	Harlan	1	V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor					
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor					

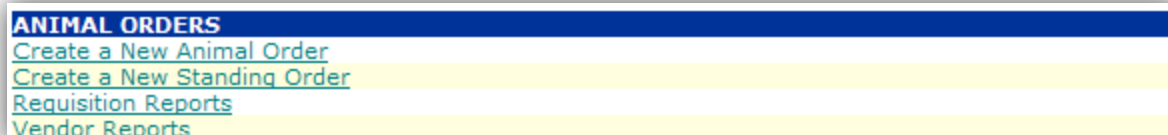
ALERTS -- ANIMAL RECEIPTS DUE													
Source	Vendor	Other Source	Vendor Loc	Expected	Order #	Item #	Qty	Species	Strain	Age	Weight	Sex	Location
Vendor Purchases	Charles River Laboratories	4		11/09/2012	V007798	1	10	Rats	Zucker			M	RVH Animal Facility-TEST
Vendor Purchases	Charles River Laboratories			11/29/2012	V007801	2	20	Rats	Zucker			F	RVH Animal Facility-TEST
Vendor Purchases	Charles River Laboratories			12/11/2012	V007804	1	2	Rats	ZDF	6 weeks	15g	M	RVH Animal Facility-TEST

ALERTS -- DELIVERY SCHEDULE													
Expected	Source	Vendor	Other Source	Vendor Loc	Order #	Item #	Requestor	Phone	Qty	Species	Strain	Age	Weight
01/08/2013	Vendor Purchases	Harlan	3		V007816	1	Morocutti, Bruna	514.398.3236	5	Mice	C57		
01/10/2013	Vendor Purchases	Charles River Laboratories			V007821-1	1	Investigator1, Rvh	5141111111x11111	8	Mice	wild-type	10 weeks	10-15g
01/10/2013	Vendor Purchases	Charles River Laboratories			V007824	1	Investigator1, Rvh	5141111111x11111	11	Mice	wild-type	10-15g	
01/14/2013	Vendor Purchases	Charles River Laboratories			V007822-1	1	Abuyer, Rvh	111-1111	9	Rats	Zucker		200g

ALERTS -- PLACED ORDERS													
Source	Vendor	Other Source	Order #	Order Date	Placed On	Species	Requestor	Protocol					
Vendor Purchases	Charles River Laboratories	2	V007798	11/08/2012	11/08/2012	Rats	Flinstone, Fred	2012-7253					
Vendor Purchases	Charles River Laboratories		V007801	11/28/2012	11/28/2012	Rats	Flinstone, Fred	2012-7253					
Vendor Purchases	Charles River Laboratories		V007821-1	01/07/2013	01/07/2013	Mice	Investigator1, Rvh	2012-7267					
Vendor Purchases	Charles River Laboratories		V007822-1	01/07/2013	01/07/2013	Rats	Abuyer, Rvh	2013-7276					
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	01/07/2013	Mice	Investigator1, Rvh	2013-7276					
Vendor Purchases	Charles River Laboratories		V007804	12/10/2012	12/10/2012	Rats	Presley, Elvis	2012-7256					
Vendor Purchases	Harlan		V007816	12/14/2012	01/07/2013	Mice	Morocutti, Bruna	2012-7256					

B. ABUYER Creates an Order Request

1. Select the **Create a New Animal Order** option in the **Animal Orders** section on your Darwin home page.



2. The **Create New Animal Order > PI Name Search** page opens. Enter any combination of PI name filters and click **Search**

Create New Animal Order > PI Name Search

Enter any combination of PI name filters and click Search.

First Name	<input type="text"/>
Mid Initial	<input type="text"/>
Last Name	<input type="text"/>

The Name Search results are displayed.

Name Search Results List

Choose desired person from search results list

Select	Full Name	Contact ID	Business Role	FACC	Email	Phone + Ext
<input type="radio"/>	Investigator, Co		Principal Investigator	RVH-FACC	co.investigator@mcgill.ca	555.555.5555
<input checked="" type="radio"/>	Investigator1, Rvh		Principal Investigator	RVH-FACC	rvh.investigator1@mcgill.ca	514111111x11111
<input type="radio"/>	Investigator2, Mac		Principal Investigator	MAC-FACC	mac.investigator@mcgill.ca	514222222x2222

Select

Return to PI Name Search

- The list of your approved protocols appears on the **Create New Animal Order > List of Approved Protocols** page. Select a protocol by clicking on one of the radio buttons beside the PI name and click **Continue**.

Create New Animal Order > List of Approved Protocols

Choose a protocol from your list of approved protocols.

Select	PI	Protocol #	Protocol Title	Species Name	Authorized #	Balance	Expiration Date
<input checked="" type="radio"/>	Investigator1, Rvh	2012-7267	)))))) Testing 11G by submitting a new protocol with Internet Explorer.	Mice	30100	30100	12/01/2015
<input type="radio"/>	Investigator1, Rvh	2012-7267	)))))) Testing 11G by submitting a new protocol with Internet Explorer.	Rats	30000	29995	12/01/2015

Continue

Cancel & Return to Home Page

- The **Create New Animal Order > Animal Source** page opens. Select the radio button for **Vendor Purchases** radio button and click **Continue**.

Create New Animal Order > Animal Source

Choose source of animals:

- **Vendor Purchase**, are animals procured from commercial vendors
- **Procurement from outside the institution** such as from an investigator at another institution (not from commercial animal vendors)
- **Transfer animals** from one protocol to another
- **Request for farm animal use**
- **Wildlife Capture**, are animals captured in the wild

Order Number	New
Order Date	01/04/2013
Principal Investigator	Investigator1, Rvh
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Select	Animal Source
<input checked="" type="radio"/>	Vendor Purchases

Continue

Cancel & Return to Home Page

This feature only applies to orders deriving from an approved vendor source available on the drop-down list.(e.g. Charles River, Jackson, Taconic, Harlan)

5. The **Create New Animal Order > Order Information** page opens. Complete all required fields (those indicated by a red asterisk *).

Create New Animal Order > Order Information

Enter all information pertinent to this order such as Source, Requester, and Sponsor

Order Info

Order Number	New
Order Date	01/07/2013
Principal Investigator	Investigator1, Rvh
Protocol No	2013-7276
Expiration Date	01/07/2016
Species	Mice

Animal Source Info

Animal Source	Vendor Purchases
---------------	------------------

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	<input type="text" value=""/>	*
Notes to Vendor	<div> <div>Chanca</div> <div>Charles River Laboratories</div> <div>Covance</div> <div>Harlan</div> <div>Jackson Laboratories</div> <div>Laka</div> <div>Marshall</div> <div>Ryerson Chinchilla Ranch</div> <div>Sinclair bio-resources</div> <div>Taconic Farm</div> </div>	<input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>
Purchase Order Number	<input type="text" value=""/>	
Vendor Information	<input type="text" value=""/>	

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Abuyer, Rvh
Requestor Phone	111-1111 *
Requestor Email	rvhbuyer@mcgill.ca *

If this order will be paid for by a person other than the PI who owns the protocol, please indicate so and enter the name of this person. The sponsor information needs to be entered exactly as in contact management

Will this purchase be paid for by someone other than PI?	Yes <input type="radio"/> No <input checked="" type="radio"/> *
Payee First Name	<input type="text" value=""/>
Middle Initial	<input type="text" value=""/>
Last Name	<input type="text" value=""/>

6. Sponsor Information:

Sponsor Information applies primarily for Umbrella or Service protocols when the transaction is paid by someone other than the PI/ PI Account.

The ABUYER can select any account within the FACC site setups even if the PI is not an authorized user on that account. This feature should be used with diligence and is only accessible to Office Users.

- a. Select **yes** for “**Will this purchase be paid by someone other than PI?**”
- b. Complete the name fields (NOTE: the name annotation must be an exact match to the Contact Management master list. The [Protocol Search](#) function can be used for name validation)

If this order will be paid for by a person other than the PI who owns the protocol, please indicate so and enter the name of this person. The sponsor information needs to be entered exactly as in contact management

Will this purchase be paid for by someone other than PI? Yes ☒ No ☐

Payee First Name

Middle Initial

Last Name

Continue Cancel & Return to Home Page

7. Click the **Continue** button.

8. The **Create New Animal Order > Order Line Detail** page opens. Complete all required fields (those indicated by a red asterisk *).

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	Run
Order Date	01/01/2013
Principal Investigator	Investigator, Run
Purchase Order	0111-1111
Expiration Date	01/01/2018
System File	

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Delivery Date	Qty	Per Cost	Category of Expenses	Strain	Weight	Age	Sex	Facility	Source No	Per Diem	Per Diem Amount	Remarks	Personnel Assigned
01/01/2013	0	0	M				Male						
01/01/2013	0	0	M				Male						
01/01/2013	0	0	M				Male						

Animal Source Info

Animal Source/Vendor Purchase

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor.

Vendor Name: Charles River Laboratories

Notes to Vendor:

Purchase Order Number:

Vendor Information:

Order Notes

Notes to Animal Technicians:

Assignment Information:

Save as Template

If this is a frequent spot order, you may save as a template for future use.

Save as Template for Future Use: ☐

Type a description to identify this template with:

Requester Info

Confirm phone number and e-mail id of person to notify about this order.

Requester Name: Run

Requester Phone: 111-1111

Requester Email: runbuyer@mcgill.ca

Save Order Info Place with Vendor Wait Listed Cancel & Return to Home Page

Once you have entered all the necessary information, choose one of the following buttons:

- **Save Order Info** – to wait for the vendor’s confirmation (in that case, the order is displayed in the **Alerts -- New Animal Orders** section).
- **Place with Vendor** – Place the order with the vendor (the order will be displayed in the **Alerts -- Delivery Schedule** section for the Animal Buyer).
- **Wait Listed** – Wait-list the order (it is displayed on wait listed alert).
- **Cancel & Return to Home Page** – Cancel all the changes you have just made to the order and return to your home page.

Note

Before you “Place with Vendor”, you can print the order and email it to the vendor for confirmation. See [Print requisition for vendor confirmation](#)

C. Animal Order Request for Shared Housing

Here is the summary of the animal order workflow for Shared Housing:



Scenario:

- *The MAC FACC is the Home Site and the RVH Animal Facility – Test is the Host Facility.*
- *Mac Investigator2 is the Home Principal Investigator at the MAC. On a protocol, he will see Housing Locations created by the Host facility (RVH) ABUYER at MAC called "RVH Animal Facility used by MAC"*

The Home Principal Investigator (*Mac Investigator2*) must choose the shared housing facility he wants to house the animal in (*RVH Animal Facility used by MAC*).

Housing Location Information

This is essentially to determine which animal facility will be receiving your animal orders. If housing in your laboratory but ordering animals, please choose the name of the animal facility which will place your orders and receive the animals.

For field type studies or if no housing is involved, select "Not Applicable".

Principal Investigator	Investigator2, Mac
Protocol Application Number	2013-7275
Document Type	New
Protocol Year	1
Species Name	Mice
Facility Name	<div> <input type="text"/> <div> </div> </div>

* Required Fields

- Downtown Stewart Biology Phytotron Facility
- Downtown Stewart Biology Research Lab used by MAC
- Mac Campus Avian Conservation Centre
- Mac Campus Dairy Complex
- Mac Campus Field Study
- Mac Campus Large Animal Research Unit
- Mac Campus Poultry Complex
- Mac Campus Research Lab
- Mac Campus Show Arena
- Mac Campus Swine Complex
- McIntyre Animal Facility used by MAC
- Other Country
- RVH Animal Facility used by MAC-TEST**
- Redpath Museum Research Lab
- Stewart Biology Animal Facility used by MAC

When the protocol is approved, the Housing Location named herein will be available for orders. For this protocol, the MAC PI will be able to order animals to be housed in MAC or RVH facilities used for Outside Housing by MAC.

Housing Location

Species Name	Mice
Facility Name	
Mac Campus SARU Facility-TEST	
RVH Animal Facility used by MAC-TEST	

[Table of Contents](#)

The process for creating an animal Order request is the same as described in Section [A. PI Creates an Animal Order](#).

To create an Order Requisition by the ABUYER, the ABUYER must switch to the home page Home FACC site before following instruction in section [B. ABUYER Creates Order Request](#)

On the line item Information section of the Create New Animal Order page, select the shared housing facility

Create New Animal Order (multiple sources) Investigator2, Mac PI

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	New
Order Date	01/11/2013
Principal Investigator	Investigator2, Mac
Protocol No	2012-7273
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Per Diem Account	Remarks	Purchase Account
	0	0					Male				
	0	0					Male	Mac Campus SARU Facility-TEST RVH Animal Facility used by MAC-TEST			
	0	0					Male				

[Add Line Items](#)

After the PI creates and submits an order request, the system will assign an order number. An e-mail notification will be issued to the ABUYER and ASUPER and the Alerts -- **New Animal Orders** on the Darwin home page for the Home FACC site.

Home Page Abuyer, Rvh MAC: ABUYER

Alerts... [Orders: New](#)

Animal Orders

Sites

MAC FACC RVH FACC

Roles

ASUPER

[Change Password](#)

ALERTS -- NEW ANIMAL ORDERS

Source	Vendor	Other Source	Order #	Order Date	Registrar
Vendor Purchases	Charles River Laboratories		V007826	01/11/2013	Investigator2, Mac

ANIMAL ORDERS

[Create a New Animal Order](#)

[Create a New Standing Order](#)

[Requisition Reports](#)

[Vendor Reports](#)

[Create a New Animal Order From Template](#)

[Auto Receive Animal Shipments](#)

[Requisition Search](#)

[Setup Vendor](#)

[Setup Species](#)

[Setup Facilities & Rooms](#)

[Standing Order Search](#)

[Animal Receipt Reports](#)

[Reconcile Vendor Invoices](#)

Host facility ABUYER Home FACC site

Note

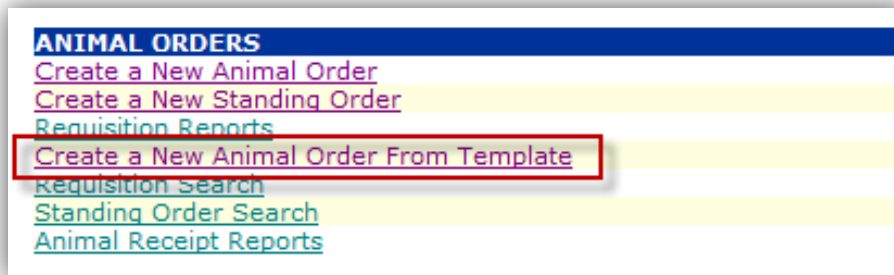
The Host Animal Buyer and Animal Facility Supervisor will only be able to view the alerts pertaining to the shared housing host facility in the protocol's Home FACC site home page.

To view the alerts for the shared housing, the Host Animal Buyer must switch to the Home site from the Table of Contents (TOC) of Darwin home Page.

Create a New Animal Order from a Template

Animal Order requisitions can be saved as templates for future requests. Templates will only remain available during the approved annual period of the protocol.

1. Select the **Create a New Animal Order from a Template** option in the **Animal Orders** section on your home page.



2. The list of your saved templates appears on the **Create a new animal order from template** page. Select the template by clicking on the order # hyperlink.

A screenshot of the "Create a new animal order from template" page. The page has a header "Create a new animal order from template" and a user role "Rvh, Investigator". Below the header is a text box explaining the two-step process. Below the text is a table of templates. At the bottom is a "Return To Home Page" button.

Template	Protocol #	Order #	Originator	Species	Vendor	Requestor Phone	Email Id	Account
Sentinel orders	2012-7267	V007891			Charles River Laboratories			
Other strain Shared Order	2012-7267	V007899			Charles River Laboratories			
Experiment A	2012-7267	V007921			Charles River Laboratories			
Experiment B	2012-7267	V007922			Jackson Laboratories			
ExperimentC	2012-7267	V007923			Charles River Laboratories			

3. The **Create New Animal Order>Order Line Detail** page opens. Review and apply any required changes to the order.
4. Click **Submit to Facility** to process the request. ***Do not click the buttons multiple times. Multiple clicks will cause creating multiple orders. Wait until the submit process completes.*

Approval of Order Request

The Facility Supervisor role is to assign a building and room number where housing is requested. The order request is displayed in the **Alerts -- New Animal Orders** section.

The Abuyer can override the ASUPER workflow. However, the very first order of a protocol must respect the **PI ➔ ASUPER ➔ ABUYER** workflow.

1. Click the order number to select and view the order. The **Create New Animal Order > Order Line Detail** page opens.

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

2. Enter the assigned/ confirmed Room number in the **Room No.** field

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	V007823
Order Date	01/07/2013
Principal Investigator	Investigator1, Rvh
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Select	Item #	Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Room No	Per Diem	Per Diem Account	Remarks	Purchase Account
<input type="radio"/>		101/09/2013	20	5	C	wild-type		6 weeks	Male	RVH Animal Facility-TEST			1114		1114

[Split Room](#)

Animal Source Info

Animal Source: Vendor Purchases

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name: Harlan

Notes to Vendor

Order Notes

Notes to Animal Technicians

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor: Investigator1, Rvh

Requestor Phone: 5141111111x11111

Requestor Email: rvh.investigator1@mcgill.ca

[Submit to Animal Buyer](#) [Cancel & Return to Home Page](#)

Room number must exactly match the Room set up in the Master List (Facilities and room Setup). This field is Case-sensitive. Use of the alternate letter case, will have implications later in the process and you will be unable to create cage cards.

Note

If the Order Requisition submitted by the PI derived from an Order Template, the room number from the original requisition will display in the Room field by default. In this case, confirm or revise the room number.

Note

The PI has the option of requesting the preferred housing location in the Requested Housing Room # field.

3. Additional housing rooms can be assigned by clicking **Split Room** (for further actions, follow the on-page instructions) and then approve it by clicking Submit to Animal Buyer.
 - a. Select the item from the **Item Information** section and click **Split Room**.

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Select	Item #	Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility*	Room No	Per Diem	Per Diem Account	Remarks	Requested Housing Room #	Purchase Account
<input checked="" type="radio"/>		1/07/04/2013	10	50		wild-type			Male	RVH Animal Facility-TEST	TestA		1114		TestA	1114

Split Room

The **Create New Animal Order>Split Room** page opens.

- b. In the **Split Rooms Information** section, complete the field for the animals in the alternate location.

Note

Room number must exactly match the Room set up in the Master List (Facilities and room Setup). This field is Case-sensitive. Use of the alternate letter case will have implications later in the process and you will be unable to create cage cards.

Create New Animal Order > Split Room

Order Info

Order Number	V007921
Order Date	07/03/2013
Principal Investigator	Rvh, Investigator
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Item #.	Delivery Date*	Qty*	Per Cage*	Category of invasiveness*	Strain	Weight	Age	Sex	Facility*	Room No	Per Diem*	Per Diem Account*	Remarks	Requested Housing Room #	Purchase Account
1	07/04/2013	10	5	D	wild-type			M	RVH Animal Facility-TEST	TestA		1114		TestA	1114

Split Rooms Information

Enter the quantity of animals you wish to move and the facility and room to move them to

Qty*	Facility*	Room No*
5	RVH Animal Facility-TEST	TestC

Animal Source Info

Animal Source	Vendor Purchases
---------------	------------------

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	Charles River Laboratories
Notes to Vendor	

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Rvh, Investigator
Requestor Phone	5141111111x1111
Requestor Email	investigator.rvh@mcgill.ca

- Click save **Split Room and Continue**. A new item is created in the **Item Information** section of the **Create New Animal Order>Order Line Detail** page.

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	V007921
Order Date	07/03/2013
Principal Investigator	Rvh, Investigator
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Select	Item #	Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Room No	Per Diem	Per Diem Account	Remarks	Requested Housing Room #	Purchase Account
<input type="radio"/>	1	07/04/2013	5	5	D	wild-type			Male	RVH Animal Facility-TEST	TestA		1114		TestA	1114
<input type="radio"/>	2	07/04/2013	5	5	D	wild-type			Male	RVH Animal Facility-TEST	TESTC		1114		TestA	1114

Split Room

- If the approval is performed by the ASUPER : Click **Submit to Animal Buyer** to complete the approval and continue to the next step of the ordering process.

When the supervisor approves the order, it remains in the **Alerts – New Animal Orders** section on their home page with the workflow changed to the Animal Buyer status.

ALERTS -- NEW ANIMAL ORDERS										
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At	
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Animal Buyer		
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor		

If the approval is performed by the ABUYER, the ordering process can be completed in this step by clicking **Placed with Vendor**

The order will move to the **Alerts – Placed Animal Orders**.

Note

If the supervisor takes no action on the order request, its workflow status will say Animal Facility Supervisor. However, the Animal Buyer may still place the order. Therefore, the supervisor should notify the PI and the Animal Buyer of any decision to cancel or hold the order

Approval of Order Request for Shared Housing

To view the alerts for the shared housing, the Host Facility Supervisor must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

1. As the **Host Facility ASUPER** (*Rvh Asuper*), select the Home FACC site (*MAC*) from the Table of Contents.

The screenshot shows the Darwin Home Page interface. At the top, the user is logged in as 'Asuper, Rvh'. Below this, there are two tabs: 'MAC: ASUPER' and 'RVH FACC'. The 'MAC: ASUPER' tab is selected. On the left sidebar, under 'Sites', 'MAC FACC' is highlighted with a red box and an arrow pointing to it, labeled 'Home FACC site'. The main content area shows the 'ALERTS -- NEW ANIMAL ORDERS' table. The first row of the table is highlighted in red and contains the following data: Source: Vendor Purchases, Vendor: Charles River Laboratories, Other Source: , Order #: V007826, Order Date: 01/11/2013, Requestor: Investigator2, Mac, Protocol: 2012-7273. Below the table, there are links for 'ANIMAL ORDERS', 'Auto Receive Animal Shipments', 'Requisition Search', and 'Animal Receipt Reports'. At the bottom of the page, there are labels for 'Host facility ASUPER' and 'Home FACC site: Role'.

The example above shows that the Host facility ASUPER (*Rvh Asuper*) from the RVH changed his role to MAC:ASUPER and the order request is displayed in the ALERTS – NEW ANIMAL ORDERS

2. Follow instructions as described in [Facility Supervisor Approves Order Request](#).
3. Indicate “TBD” in the **Room Number** Field on the **Create New Animal Order>Order Line Detail** page, then click on **Submit to Animal Buyer**

Note

Noting “TBD” as a room number is a virtual process performed in the protocol Home site. The information will be adjusted further on in the animal order process.

Animal Buyer Process the Order Initiated by the PI

Once the PI submits the order request, the Animal Buyer has it displayed in the **Alerts -- New Animal Orders** section with the workflow status of Facility Supervisor. When the order is approved by the Facility Supervisor, the workflow status says Animal Buyer.

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Animal Buyer	
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

To process the order initiated by the PI:

1. From **Alerts -- New Animal Orders** section, click the order number. The **Create New Animal Order > Order Line Detail** page opens

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	007823
Order Date	01/07/2013
Principal Investigator	Investigator1, Ruh
Protocol No.	2013-7367
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Select	Item #	Delivery Date	Qty	Per Cap	Category of Acquisition	Strain	Weight	Age	Sex	Facility	Room No.	Per Diem	Per Diem Account
<input type="radio"/>	1	01/09/2013	20	5	C	wild type		6 weeks	Male	RVH Animal Facility-TEST			1114

Add Line Items **Item Pricing**

2. In the **Item Information** section, modify all the required fields, (*) if necessary. If the Facility Supervisor did not enter the room #, the Animal Buyer must enter it because it will have implications further into the process and in practice.
3. To enter item pricing on a line item:
 - a. If more than one line item is available, click on the radio button and click the **Item Pricing** button.
 - b. The **Create New Animal Order > Item Pricing** page opens. Follow the on-page instructions to perform item pricing.

Create New Animal Order > Item Pricing

There are 2 ways you can enter item pricing:

- Check the **Calc Cost** box and eSirius will calculate the Cost based on **Quantity * Unit Price**
- Type the cost directly in the **Cost** field. In this case, uncheck the **Calc Cost** box. Quantity and Unit price are ignored

Note that the Cost will not automatically calculate unless you click **Calc Price** or **Save Item Price**. Same is true for calculating price subtotals.

Order Info

Order Number	V007823		
Order Date	01/07/2013		
Principal Investigator	Investigator1, Rvh		
Protocol No	2012-7267		
Expiration Date	12/01/2015		
Species	Mice		
Total Item Cost	0.00		

Description	Quantity	Units	Unit Price	Cost	Calc Cost	Subtotal?	Billable?	Billed?
Purchase Price	0	dollars	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Freight	0		0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Boxes	0		0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Tax	0		0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	No

After you have entered the Quantity and the Unit Price, check the appropriate checkboxes in the **Calc Cost** column then click on the **Calc Price** button for Darwin to calculate the cost for you. The total will display in the **Total Item Cost** field above the table.

Order Number	V007823		
Order Date	01/07/2013		
Principal Investigator	Investigator1, Rvh		
Protocol No	2012-7267		
Expiration Date	12/01/2015		
Species	Mice		
Total Item Cost	135.00		

Description	Quantity	Units	Unit Price	Cost	Calc Cost	Subtotal?	Billable?	Billed?
Purchase Price	11	dollars	10.00	110.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Freight	1		25.00	25.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Boxes	0		0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Tax	0		0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	No

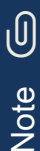
Once you have completed entering the **Order Info** section, click on the **Save Item Price**

- **Clear Form** button brings you back to the **New Animal Order > Order Line Detail** page.
- **Cancel** button will cancel the transaction and return back to the **New Animal Order > Order Line Detail** page.



Note

You can enter the prices on the line item any time before the order is ‘received’. After editing an order in the “placed Order alert”, the order must be “placed with vendor” again , otherwise it is returned to the Alerts: New Animal orders.



Note

When the order moves from the **Alerts -- New Animal Orders** section to the **Alerts -- Delivery Schedule** section, the **Item Pricing** button is no longer available on the **Create New Animal Order > Order Line Detail** page. You can, however, use the [Requisition Search](#) to locate the order and then enter the item prices.

4. Once you have modified the order, choose one of the following buttons:
 - **Save Order Info** – Save order info to wait for the vendor’s confirmation or if you process involves entering the animal purchase information since the requisition is editable at this stage. The order remains in the **Alerts -- New Animal Orders** section.
 - **Place with Vendor** – Place the order with the vendor. The order move to **Alerts – Placed Orders** and, if expected within the next 7 days it will also appear in the **Alerts-- Delivery Schedule**. The PI will receive also receive an alerts on his Home page as well as an e-mail notification.
 - **Wait Listed** – Wait-list the order. The order is displayed on **Alert—Wait Listed Orders**. The process can be continued at a later time.
 - **Cancel Order** – Cancels the order when requested by the PI (the order is no longer displayed in any alert, and the PI is notified of the order cancellation via email). This is the final step to the cancellation process and must be completed by the ABUYER in for register adjustment to occur.
 - **Cancel & Return to Home Page** – Cancel all the changes you have just made to the order and return to your home page. This will not change the status of the order Requisition.

Animal Buyer Processes the Order for Shared Housing

To view the alerts for shared housing, the Host Animal Buyer must switch to the Protocol’s Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

1. From the Host Animal Buyer Darwin Home Page, switch to the Home (MAC) FACC site from TOC.

The screenshot shows the Darwin Home Page with a sidebar on the left containing links like Alerts, Orders, Animal Orders, Sites, Roles, and Change Password. The main content area is titled 'ALERTS -- NEW ANIMAL ORDERS' and contains a table with columns: Source, Vendor, Other Source, Order #, Order Date, Requestor, and Request Date. A row is visible with Source 'Vendor Purchases', Vendor 'Charles River Laboratories', Order # 'V007826', Order Date '01/11/2013', and Requestor 'Investigator2, Mac'. Above this table, there are two tabs: 'Abuyer, Rvh' and 'MAC: ABUYER'. Red arrows point from the 'MAC: ABUYER' tab to the 'Requestor' field in the table, and from the 'RVH FACC' link in the sidebar to the 'Home FACC site' label. Another red arrow points from the 'Host facility ABUYER' label to the 'Abuyer, Rvh' tab.

The example above shows that the Host facility ABUYER (*Rvh Abuyer*) from the RVH changed his role to MAC:ABUYER and the order request is displayed in the ALERTS – NEW ANIMAL ORDERS

2. From the Home (MAC) Facility Darwin Home Page, click the order number under the **Alerts -- New Animal Orders** section.
3. The Create **New Animal Order > Order Line Detail** page opens. Under the **Item Information** section, modify all the required fields (*).
 - For the **Per Diem Account** section, choose any per diem account. The per diems of the Home FACC site will be displayed, and they will not be processed through the Home facility .Animal order will be charged (if required) via service charges from the Host facility to the PI.
 - If the Facility Supervisor did not enter the room #, the Animal Buyer must enter “TBD”. (actual room number will be addressed when you create the quick cards)
 - **Do not enter any Item Pricing.** All transport related to cost should be done via service request.

Order is on Delivery Schedule

Animal orders are displayed in the **Alerts -- Delivery Schedule** section when they are placed with the vendor. (The **Alerts -- Delivery Schedule** section is typically assigned to the Animal Buyer, Facility Supervisor, and Receiving Technician).

ALERTS -- DELIVERY SCHEDULE																		
Expected	Source	Vendor	Other Source	Vendor Loc	Order #	Item #	Requestor	Phone	Qty	Species	Strain	Age	Weight	Sex	Location	Room	Per Diem	Placed On
01/10/2013	Vendor Purchases	Charles River Laboratories			V007821-1	1	Investigator1, Rvh	5141111111x11111	8	Mice	wild-type	10 weeks	10-15g	M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage	01/07/2013
01/10/2013	Vendor Purchases	Charles River Laboratories			V007824	1	Investigator1, Rvh	5141111111x11111	11	Mice	wild-type		10-15g	M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage	01/07/2013
01/14/2013	Vendor Purchases	Charles River Laboratories			V007822-1	1	Abuyer, Rvh	111-1111		9 Rats	Zucker		200g	M	RVH Animal Facility-TEST	TestB	Test Rat Conventional Cage	01/07/2013

On the scheduled delivery date, the orders displayed in the **Alerts -- Delivery Schedule** section will automatically move to the **Alerts -- Animal Receipts Due**. Once an order is received, it no longer appears in any alert. To see more definition of the animal orders alerts, go to [Appendix A: Animal Order Alerts](#)

Note

Once the order is on the **Alerts -- Delivery Schedule**, the Animal Buyer must prepare the cage cards. See [Cage Cards Management \(Darwin Desktop\)](#).

Order is on Delivery Schedule for Shared Housing

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Orders Cancelled by the PI

Before the shipment arrives, the PI can submit a request to cancel the order. If the request is placed in time, the cancellation process must be confirmed by the Animal Buyer.

Note

This application will cancel the entire order requisition. For cancellation of an individual shipment on a multi-item requisition, [Cancel Shipment](#)

1. The PI will submit the request to cancel the order requisition by clicking on the **Request to Cancel Order** button on the order requisition.
2. The ABUYER receives the CANCELLED BY PI-ALERT on the home page as well as an e-mail notification.
3. From Animal Buyer Darwin home page, select an order from the **Alerts -- Orders Cancelled by the PI**.

ALERTS -- ORDERS CANCELLED BY PI								
Source	Vendor	Order #	Requestor	Order Date	Status	Protocol	Species	
Vendor Purchases	Harlan	V007825	Investigator1, Rvh	01/07/2013	PI Cancelled	2013-7276	Rats	

4. If the order can be cancelled with the vendor in time then;
 - a. the ABUYER confirms the cancellation subsequently cancelling the order by clicking **CANCEL**

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Investigator1, Rvh
Requestor Phone	514111111x11111 *
Requestor Email	rvh.investigator1@mcgill.ca *

b. The protocol register is credited

Protocol Species Register Detail

Protocol Info

Principal Investigator	Investigator1, Rvh
Protocol Number	2012-7267
Protocol Title	)))))) Testing 11G by submitting a new protocol with Internet Explorer.
Current Status	Approved (w/o Stipulation)
Approve Date	12/01/2012
Protocol Expiry Date	12/01/2013
3rd Yr Full Renewal Due Date	12/01/2015
Species Name	Mice
Pain Level	C
Current Balance	29992

Register Transaction Detail

Trans Date	Trans Time	Effective Date	Category	Type	Source	Reference #	Quantity	User	Remarks
01/07/2013	16:28:31.1	01/09/2013	Order Debit	Debit	Create New Animal Order (multiple sources)	V007823:1	-20	ABUYER1	Requested by: Abuyer, Rvh
01/07/2013	16:28:47.21	01/09/2013	Order Credit	Credit	Create New Animal Order (multiple sources)	V007823:	20	ABUYER1	Adjusted order register balance
01/07/2013	16:28:59.02	01/09/2013	Order Credit	Credit	Create New Animal Order (multiple sources)	V007823:1	20	ABUYER1	Order Cancelled By User

c. The PI receives an e-mail confirmation for the cancelled order

- If the order cannot be cancelled in time, the ABUYER opens order from the alert, Orders Cancelled by PI; he has the option to **Cancel OR Place with Vendor**. Place with Vendor it puts the order back on the delivery schedule and resends the **Placed with Vendor** email notification to the PI.

Orders Cancelled by the PI for Shared Housing

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Process Received Shipment

Prior to receiving the animals in Darwin, the Animal Buyer will print the cage cards. The receiving process activates those cards so we will tear-off and discard the activation strip.

Every animal facility will have their individual process on how the shipment is received and how the shipment information will get to the Animal Buyer. Once the Animal Buyer gets information about the shipments for the day, he/ she can enter the information in the Darwin web application.

Process Received Shipment

1. From Animal Buyer's Darwin home page, select an order from the **Alerts -- Animal Receipts Due** or **Alerts -- Delivery Schedule** .The **Receive Shipments > Choose Receipt Option** page appears.

Receive Shipments > Choose Receipt Option

Choose receipt option for this shipment:

- **Received as Ordered:** Animals received as ordered, same quantity, delivery date and specs
- **Partial Shipment Received:** Number of animals received is less than what was ordered
- **Additional Animals Received:** Vendor shipped more animals than ordered
- **Shipment did not Arrive:** Expected shipment did not arrive on due date
- **Shipment Cancelled:** Shipment cancelled by PI, Buyer or Vendor

Receive Options

Order NumberV007798

Shipment receipt option▼

Continue

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Item #	Delivery Date	Qty	Per Cage	Category of invasiveness	Strain	Weight	Age	Sex	Facility	Room No	Per Diem	Per Diem Account	Remarks	Purchase Account
1	11/09/2012	10	5A		Zucker			Male	RVH Animal Facility-TEST		Test Rat Conventional Cage	6789		6789

Order Info

Order NumberV007798

Order Date11/08/2012

Principal InvestigatorFlinstone, Fred

Protocol No2012-7253

Expiration Date11/01/2015

SpeciesRats

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor NameCharles River Laboratories

Notes to Vendor

Purchase Order Number

Vendor Information

Requester Info

Confirm phone number and e-mail id of person to notify about this order

RequestorFlinstone, Fred

Requestor Phone398-4567

Requestor Emailfred.flinstone@mcgill.ca

Order Notes

Notes to Animal Technicians

Shipment Information

Return to Home page

2. Choose one of the **Shipment receipt options**:

The screenshot shows a web form titled "Receive Options". It contains a text field for "Order Number" with the value "V007798". Below it is a dropdown menu for "Shipment receipt option" with a red asterisk indicating it is required. The dropdown menu is open, showing five options: "Received as Ordered", "Partial Shipment Received", "Additional Animals Received", "Shipment did not Arrive", and "Cancel Shipment". To the left of the dropdown is a "Continue" button. Below the dropdown is a section titled "Item Information".

Process Received Shipment for Shared Housing

- The requisition data is stored on the Home FACC site. Therefore, Host ABUYER or ASUPER must switch to the protocol's Home site from the Table of Contents (TOC) of Darwin Home Page to process received Shipments.
- Since the facility is NOT barcoded, the Animal Buyer can receive the animals without printing the cage cards.
- Cage cards are generated by the ACCOORD role using the Darwin Desktop Quick Card function. Refer to [Darwin for the Animal Census Coordinator Office Users](#) manual)
- Shipment Receipt is done as per regular process, refer to Darwin - Animal Orders for Animal Buyers manual.

Received as Ordered

A shipment received as ordered means that the animals received as ordered: same quantity, and delivery date. To proceed with this shipment option:

1. From **Receive Shipments > Choose Receipt Option** page, select **Received as Ordered** and click the **Continue** button.

This screenshot is similar to the one above, but the "Received as Ordered" option in the "Shipment receipt option" dropdown menu is highlighted with a red rectangular box. The "Continue" button remains visible to the left.

2. From the **Receive Shipments > Update Receipt Information** page, complete the required fields .

Receive Options

Order Number: V007798

Shipment receipt option: Received as Ordered

Item Receipt Information

Item #	Expected	Received	Order Qty	Receipt Qty	Per Cage	Cages	Strain	Age	DOB	Weight
1	11/09/2012	11/09/2012	10	10	5	2	Zucker			

Item Receipt Notes

3. Click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
4. Click the **Finish this Item** button to complete the order receipt. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Partial Shipment Received

Partial shipment received means that the number of animals received is less than what was ordered. To proceed with this shipment option:

1. From the **Receive Shipments > Choose Receipt Option** page, select **Partial Shipment Received** and click **Continue**.

Receive Options

Order Number: V007798

Shipment receipt option: Partial Shipment Received

Continue

Item Information

2. From the **Receive Shipments > Update Receipt Information** page, review and edit the required fields * (i.e. Received Date and Receipt Quantity).

Receive Options

Order Number: V007798

Shipment receipt option: Partial Shipment Received

Item Receipt Information

Item #	Expected	Received	Order Qty	Receipt Qty	Per Cage	Cages	Strain	Age	DOB	Weight
1	11/09/2012	11/09/2012	10	10	5	2	Zucker			

Item Receipt Notes

3. For **Item Receipt Notes** section, enter notes related to the receipt of this shipment.
4. Click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.

- If you know the vendor will be shipping the rest of the animals, put a check on **Create backlog item for remaining animals** and change the new expected delivery date for the remaining animals.

If you wish to receive remaining animals at a later date, please fill in information in this section. If ~~not, leave blank and shipment for remaining animals will be cancelled.~~

Create a backlog item for remaining animals	<input checked="" type="checkbox"/>
Expected delivery date for remaining animals	01/15/2013

- If needed, check cage card records that you wish to discard.

Discard Cage Card List

Check cage card records that you wish to discard

Card ID	<input type="checkbox"/> 0000150880	<input type="checkbox"/> 0000150881
---------	-------------------------------------	-------------------------------------

- Click the **Finish this Item** button. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Note

If you have entered a new shipping date and discarded some of the cage cards, you will see this order # in the home page under **Alerts -- Placed Orders** and **Alerts -- Delivery schedule** (the order will appear in this alert if it is 7 days before the delivery date). Now, you will have to prepare the cage cards for this order and once the shipment has arrived, you will do the "[Process Received Shipment](#)" procedure.

Additional Shipment Received

Additional Animals Received means vendor shipped more animals than ordered. To proceed with this shipment option:

- From the **Receive Shipments > Choose Receipt Option** page, select **Additional Shipment Received** and click **Continue**.

Receive Options

Order Number	V007798
Shipment receipt option	<input type="button" value="Continue"/> <input type="button" value="Additional Animals Received"/> *
Item Information	<ul style="list-style-type: none"> Received as Ordered Partial Shipment Received Additional Animals Received Shipment did not Arrive Cancel Shipment

- From the **Receive Shipments > Update Receipt Information** page, review and edit the required fields * (i.e. Received Date and Receipt Quantity).

Item Receipt Information

Item #	Expected	Received	Order Qty	Receipt Qty	Per Cage	Cages	Strain	Age	DOB
1	11/09/2012	11/09/2012	10	12	5	2	Zucker		

- Then click the **Continue** button to open **Receive Shipments > Finish Item Receipt** page .
- For the **Receive Additional Animals** section;
 - Indicate if additional cards are needed. If yes, check the **Print Additional Cards** checkbox
 - Indicate if the additional animals are to be debited from the protocol

Receive Additional Animals

Enter the number of additional cage cards needed, if any. If prompted, you may debit the protocol with the additional number of animals.

Number of additional cage cards needed (leave blank or 0 for none)

Debit protocol with additional animals? ☒

Print Additional Cards ☒

If the **Print Additional Cards** box is checked, you will need to go to Darwin Desktop to print additional cards. Use **Print Cage Cards > Choose Option** for **Print cards for selected Order Number and/or line item** and put a check on **Exclude cards that have been printed?**.

- Click the **Finish this Item** button. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Shipment did not Arrive

Shipment did not Arrive means that the expected shipment did not arrive on due date. To proceed with this shipment option:

- From the **Receive Shipments > Choose Receipt Option** page, select **Shipment did not Arrive** and click **Continue** to open **Receive Shipments > Update Receipt Information** page .

Receive Options

Order Number: V007798

Shipment receipt option: ▼ *

Item Information

- Received as Ordered
- Partial Shipment Received
- Additional Animals Received
- Shipment did not Arrive
- Cancel Shipment

- For **Item Receipt Information** section, enter the new expected date.

Item Receipt Information

Item #	Expected	Order Qty	Per Cage	Cages	Strain	Age	DOB	Weight	Sex	Facility	Room No	Per Diem	Barcoded?
1	11/09/2012	10	5	2	Zucker		//		Male	RVH Animal Facility-TEST		Test Rat Conventional Cage	Yes

Item Receipt Notes

- For **Item Receipt Notes** section, enter notes related to the receipt of this shipment.

Item Receipt Notes

Enter notes related to the receipt of this shipment. Include explanation of problems or changes to any of the specifications. If shipment is cancelled, please enter reason for cancellation in item receipt notes.

Receipt Notes

Weather is too warm to ship.

- Click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
- Click the **Finish this Item** button to update the information on the requisition. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Cancel Shipment

This option is recommended for the cancellation of select shipments from a multiple line item requisition. Each of these shipments will have the same Order # but different line Item #.

Shipment cancellation requests cannot be transmitted to the Animal Buyer via Darwin. Other communication means (verbal, e-mail) should be used

To cancel shipment, you would click on one of these orders and perform the steps outlined below. The line item will be cancelled and non-editable. Also, the animal numbers that were supposed to be shipped will be credited to the protocol.

For Requisitions with Multiple Line Items:

The Animal Buyer will take the following steps to cancel the shipment:

1. From Animal Buyer Darwin home page, select an order from the **Alerts -- Animal Receipts Due** or **Alerts -- Delivery Schedule**.
2. From the **Receive Shipments > Choose Receipt Option** page, select **Cancel Shipment** and click **Continue**.

Receive Options

Order Number V007798

Shipment receipt option

Continue

Item Information

Received as Ordered
Partial Shipment Received
Additional Animals Received
Shipment did not Arrive
Cancel Shipment

3. From the **Receive Shipments > Update Receipt Information** page, you need to enter the reason for the order cancellation under the **Item Receipt Notes** section.

Item Receipt Notes

Enter notes related to the receipt of this shipment. Include explanation of problems or changes to any of the specifications. If shipment is cancelled, please enter reason for cancellation in item receipt notes.

Receipt Notes

4. Then click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
5. Click the **Finish this Item** button to update the information. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

For Requisitions with Single Line Item:

Use of the **Cancel Order** option is recommended for single line item requisitions. In addition to cancelling the shipment, the Cancel Order option will also change the order requisition status to **"Cancelled"**. Refer to [Orders Cancelled by the PI](#)

If the order is only associated with one requisition line (Item #) and the shipment is cancelled from the **Receive Shipments > Choose Receipt Option** page, the status of the order is **"Placed"**. The order can be updated to **"Cancelled"** by performing a [Requisition Search](#). Before you perform this type of search make sure you know the order # and after you have found the order do the following:

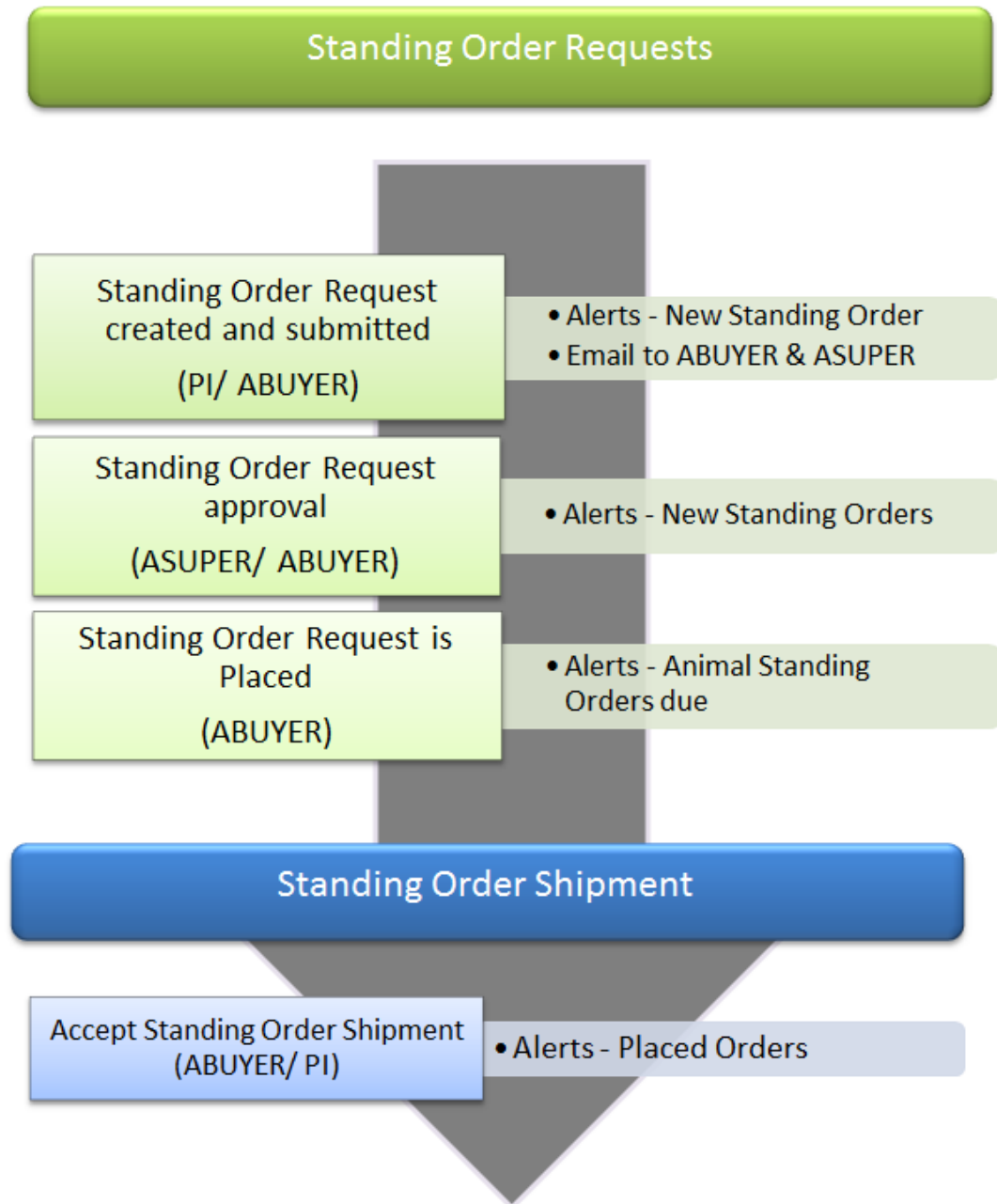
1. From the **Requisition Search Results** page, you will notice the Status is **"Placed"**. Click the **Edit Requisition** button.
2. The **Create New Animal Order> Order Line Detail** page will appear. Click the **Cancel Order** button. This will change the status of the order from **"Placed"** to **"Cancelled"**.

Standing Orders

With the standing order process, you can create an order with regularly recurring identical shipments.

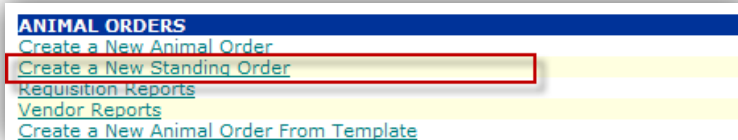
The workflow for the standing order process is the same as creating regular [Animal Orders](#)

Workflow Process for Standing Orders



Creating Standing Order (by ABUYER)

1. From Darwin home page, click on the **Create a New Standing Order** under the **Animal Orders** section.



2. The **Create New Animal Order > PI Name Search** page opens. Enter any combination of PI name filters and click **Search**.

Create New Animal Order > PI Name Search

Enter any combination of PI name filters and click Search.

First Name	<input type="text" value="r"/>
Mid Initial	<input type="text" value=""/>
Last Name	<input type="text" value="inv"/>

3. The list of the PI's approved protocols appears on the **Create New Animal Order > List of Approved Protocols** page. Select a protocol by clicking on one of the radio buttons beside the PI name and click the **Continue** button.

Create New Animal Order > List of Approved Protocols

Choose a protocol from your list of approved protocols.

Select	PI	Protocol #	Protocol Title	Species Name	Authorized #	Balance	Expiration Date
<input type="radio"/>	Investigator1, Rvh	2012-7267	)))))) Testing 11G by submitting a new protocol with Internet Explorer.	Mice	30100	30092	12/01/2015
<input type="radio"/>	Investigator1, Rvh	2012-7267	)))))) Testing 11G by submitting a new protocol with Internet Explorer.	Rats	30000	29995	12/01/2015
<input type="radio"/>	Investigator1, Rvh	2013-7276	)))))) Training/ Testing protocol (RVH).	Mice	30100	30100	01/07/2016
<input checked="" type="radio"/>	Investigator1, Rvh	2013-7276	)))))) Training/ Testing protocol (RVH).	Rats	30000	30000	01/07/2016

4. The **Create New Animal Order > Animal Source** page opens. Select **Vendor Source** for the Animal Source and click **Continue** button.

Create New Animal Order > Animal Source

Choose source of animals:

- **Vendor Purchase**, are animals procured from commercial vendors
- **Procurement from outside the institution** such as from an investigator at another institution (not from commercial animal vendors)
- **Transfer animals** from one protocol to another
- **Request for farm animal use**
- **Wildlife Capture**, are animals captured in the wild

Order Number	New
Order Date	01/07/2013
Principal Investigator	Investigator1, Rvh
Protocol No	2013-7276
Expiration Date	01/07/2016
Species	Rats

Select: Vendor Purchases

Continue Cancel & Return to Home Page

- Fill out the necessary information on the **Create New Animal Order > Order Information** page and click the **Continue** button.

Create New Animal Order > Order Information

Enter all information pertinent to this order such as Source, Requester, and Sponsor

Order Info

Order Number	New
Order Date	01/07/2013
Principal Investigator	Investigator1, Rvh
Protocol No	2013-7276
Expiration Date	01/07/2016
Species	Rats

Animal Source Info

Animal Source: Vendor Purchases

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	Charles River Laboratories
Notes to Vendor	<div style="border: 1px solid black; height: 20px;"></div>
Purchase Order Number	<div style="border: 1px solid black; height: 20px;"></div>
Vendor Information	<div style="border: 1px solid black; height: 20px;"></div>

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Abuyer, Rvh
Requestor Phone	111-1111
Requestor Email	rvhbuyer@mcgill.ca

If this order will be paid for by a person other than the PI who owns the protocol, please indicate so and enter the name of this person. The sponsor information needs to be entered exactly as in contact management

Will this purchase be paid for by someone other than PI? Yes No

Payee First Name	<div style="border: 1px solid black; height: 20px;"></div>
Middle Initial	<div style="border: 1px solid black; height: 20px;"></div>
Last Name	<div style="border: 1px solid black; height: 20px;"></div>

Continue Cancel & Return to Home Page

- If the order payment will be sponsored by another PI/ Account (For example, if the PI's animals are housed under an umbrella protocol);

- a. Select **yes** for “**Will this purchase be paid by someone other than PI?**”
- b. Complete the name fields (NOTE: the name annotation must be an exact match to the Contact Management master list. You can also perform a [Protocol Search](#) for name validation)

This action will make the sponsor account available for selection on the **Order Line Detail** page

7. Follow the on-page instructions, which are the same as for regular orders with the following exception: request a schedule of shipments after completing the line item requests.

When filling out the information for the Standing Order Delivery Schedule section, make sure you include the following fields:

- **Standing order Expiration Date:** select a date or **Limit number of shipments to:** enter a maximum number to ship.

- Choose to fill out the **Standing order occurs weekly** or the **Standing order occurs monthly** fields. Here are two examples:

For **Standing order occurring weekly**, this standing order plan is being created with the first shipment requested for August 1, 2011. Subsequent shipments are requested to occur every Monday on a weekly basis.

Standing Order Delivery Schedule

Enter the delivery schedule for this Standing Order

Plan Name														
Plan Status	<input type="button" value="v"/>													
Standing order initial expected delivery date	01/14/2013 <input type="button" value="calendar"/>													
Standing order Expiration Date	04/10/2013 <input type="button" value="calendar"/>													
Standing order occurs weekly	<input checked="" type="radio"/>	Every	1	Week (s)	Mon	<input type="checkbox"/>	Tue	<input type="checkbox"/>	Wed	<input checked="" type="checkbox"/>	Thurs	<input type="checkbox"/>	Fri	<input type="checkbox"/>
Standing order occurs monthly	<input type="radio"/>		<input type="button" value="v"/>		<input type="button" value="v"/>	Every	0	Month (s)						
Limit number of shipments to	5													

For **Standing order occurring monthly**, this standing order is created for monthly shipments. A plan is being requested for the shipment first on July 25th, 2011 with the subsequent shipments occurring every first Wednesday of every second month.

Standing Order Delivery Schedule

Enter the delivery schedule for this Standing Order

Plan Name														
Plan Status	<input type="button" value="v"/>													
Standing order initial expected delivery date	01/14/2013 <input type="button" value="calendar"/>													
Standing order Expiration Date	04/10/2013 <input type="button" value="calendar"/>													
Standing order occurs weekly	<input type="radio"/>	Every		Week (s)	Mon	<input type="checkbox"/>	Tue	<input type="checkbox"/>	Wed	<input type="checkbox"/>	Thurs	<input type="checkbox"/>	Fri	<input type="checkbox"/>
Standing order occurs monthly	<input checked="" type="radio"/>		Second		Tuesday	Every	2	Month (s)						
Limit number of shipments to	5													

- Once you have entered all the necessary information, choose one of the following buttons:

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Abuyer, Rvh	
Requestor Phone	111-1111	*
Requestor Email	rvhbuyer@mcgill.ca	*

- **Save Order Info** – Save order info will display the order in **Alerts -- New Standing Orders** section).
- **Wait Listed** – Wait-list the order (it is displayed on wait listed alert).
- **Cancel & Return to Home Page** – Cancel all the changes you have just made to the order and return to your home page.

Whether the standing order is initiated by the PI or the Animal Buyer, the PI, Animal Buyer and Facility Supervisor will see this order in **Alerts – New Standing Orders** section. If the PI initiates the creation of the standing orders, the Animal Buyer will see the order in the **Alerts – New Standing Orders** section with a workflow status of Facility Supervisor indicating the next step in the approval process. If the Animal Buyer creates the standing order, the workflow status will be empty.

Abuyer, Rvh			RVH: ABUYER			SIGN OUT	REFRESH	01/07/2013
ALERTS -- NEW STANDING ORDERS								
Vendor	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	PI	
Charles River Laboratories	V007822	01/07/2013	Abuyer, Rvh	2013-7276	Rats		Investigator1, Rvh	

Standing Order Request for Shared Housing

The process for creating an animal Order request is the same as described in Section [Creating Standing Order](#).

To create a Standing Order Requisition by the ABUYER, the ABUYER must switch to the home page Home FACC site.

On the line item Information section of the Create New Animal Order page, select the shared housing facility

Create New Animal Order (multiple sources)

Investigator2, Mac

PI

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	New
Order Date	01/11/2013
Principal Investigator	Investigator2, Mac
Protocol No	2012-7273
Expiration Date	2/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Per Diem Account	Remarks	Purchase Account
	0	0					Male				
	0	0					Male	Mac Campus SARU Facility-TEST RVH Animal Facility used by MAC-TEST			
	0	0					Male				

Add Line Items

After the PI creates and submits an order request, the system will assign an order number. An e-mail notification will be issued to the ABUYER and ASUPER and the Alerts -- **New Animal Orders** on the Darwin home page for the Protocol's Home FACC site.

Home Page Alerts... Orders: New Animal Orders Sites: MAC FACC RVH FACC Roles: ASUPER Change Password

Alerts -- NEW ANIMAL ORDERS

Source	Vendor	Other Source	Order #	Order Date	Requestor	PI
Vendor Purchases	Charles River Laboratories		V007826	01/11/2013	Investigator2, Mjc	2012

ANIMAL ORDERS
[Create a New Animal Order](#)
[Create a New Standing Order](#)
[Requisition Reports](#)
[Vendor Reports](#)
[Create a New Animal Order From Template](#)
[Auto Receive Animal Shipments](#)
[Requisition Search](#)
[Setup Vendor](#)
[Setup Species](#)
[Setup Facilities & Rooms](#)
[Standing Order Search](#)
[Animal Receipt Reports](#)
[Reconcile Vendor Invoices](#)

Host facility ABUYER **Home FACC site**

Note

The Host Animal Buyer and Animal Facility Supervisor will only be able to view the alerts pertaining to the shared housing host facility in the protocol's Home FACC site's home page.

To view the alerts for the shared housing, the Host Animal Buyer must switch to the Home site from the Table of Contents (TOC) of Darwin home Page.

Facility Supervisor Approves Standing Order Request

As with a regular order, the Facility Supervisor can accept the order request as it is, edit the housing location requested, and, for standing orders, can edit the requested delivery schedule.

Select the order from the **Alerts -- New Standing Orders** section of your home page, make changes if necessary and click **Submit to Animal Buyer**.

Asuper, Rvh				RVH: ASUPER		SIGN OUT	REFRESH	01/07/2013
ALERTS -- NEW STANDING ORDERS								
Vendor	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status		PI
Charles River Laboratories	V007822	01/07/2013	Abuyer, Rvh	2013-7276	Rats			Investigator1, Rvh

After submission, the order remains in the **Alerts -- New Standing Orders** section for the Facility Supervisor and the PI, with the ABUYER now showing in the workflow status.

Asuper, Rvh				RVH: ASUPER		SIGN OUT	REFRESH	01/07/2013
ALERTS -- NEW STANDING ORDERS								
Vendor	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status		PI
Charles River Laboratories	V007822	01/07/2013	Abuyer, Rvh	2013-7276	Rats	Animal Buyer		Investigator1, Rvh

Facility Supervisor Approves Standing Order Request for Shared Housing

To view the alerts for the shared housing, the Host Facility Supervisor must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

1. As the **Host Facility ASUPER** (*Rvh Asuper*), select the Home FACC site (*MAC*) from the Table of Contents.

The screenshot shows the Darwin Home Page interface. On the left, the 'Home Page' sidebar has a 'Sites' section with 'MAC FACC' and 'RVH FACC' links. A red box highlights 'MAC FACC', and a red arrow points to it with the label 'Home FACC site'. The main content area shows a table of 'ALERTS -- NEW ANIMAL ORDERS' with columns: Source, Vendor, Other Source, Order #, Order Date, Requestor, and Protocol. A row is highlighted with a red border, showing 'Vendor Purchases' from 'Charles River Laboratories' with Order # 'V007826' and Requestor 'Investigator2, Mac'. Above this table, the user's role is shown as 'Asuper, Rvh' in a red box, and the role is changed to 'MAC: ASUPER' in another red box. Red arrows point from these boxes to the labels 'Host facility ASUPER' and 'Home FACC site: Role' respectively. Below the table, there are links for 'Animal Orders', 'Sites', 'Change Password', and 'Home FACC site'.

The example above shows that the Host facility ASUPER (*Rvh Asuper*) from the RVH changed his role to MAC:ASUPER and the order request is displayed in the ALERTS – NEW ANIMAL ORDERS

2. Follow instructions as described in [Facility Supervisor Approves Order Request](#).
3. Indicate “TBD” in the **Room Number** Field on the **Create New Animal Order>Order Line Detail** page, then click on **Submit to Animal Buyer**

Note

Noting “TBD” as a room number is a virtual process performed in the Home site. The information will be adjusted further on in the animal order process.

Animal Buyer Processes the Standing Order Request

As with a regular order request, standing order requests appear on the Animal Buyer's home page in the **Alerts -- New Standing Orders** section. When the order is approved by the Facility Supervisor, the workflow status says Animal Buyer.

Note

The Animal Buyer can skip the facility supervisor step by simply choosing the standing order

To process the standing order:

1. From **Alerts -- New Standing Orders** section, click the order number. The **Create New Animal Order > Order Line Detail** page opens.

Abuyer, Rvh			RVH: ABUYER		SIGN OUT	REFRESH	01/07/2013
ALERTS -- NEW STANDING ORDERS							
Vendor	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	PI
Charles River Laboratories	V007822	01/07/2013	Abuyer, Rvh	2013-7276	Rats	Animal Buyer	Investigator1, Rvh

2. Modify the order information, if needed. Make sure that assigned room number is indicated otherwise it will have implications further into the process.
3. Once you have modified the standing order, choose one of the following buttons:
 - **Save Order Info** – Save order info to wait for the vendor’s confirmation (in that case, the order is displayed in the **Alerts -- New Standing Orders** section).
 - **Place Standing Order with Vendor** – Place standing order with the vendor will be displayed in the **Alerts -- New Standing Orders Due**.

ALERTS -- ANIMAL STANDING ORDERS DUE												
Next Plan #	Order #	PO Number	Principal Investigator	Expiration Date	SO Expire Date	Description	Expected Date	Protocol No	SO Status	Other Source	Requestor	Vendor Name
1	V007822		Investigator1, Rvh	01/07/2016	04/10/2013		01/14/2013	2013-7276	Active		Abuyer, Rvh	Charles River Laboratories

- **Wait Listed** – Wait-list the order (it is displayed on wait listed alert).
- **Cancel Order** – Cancel the order when requested by the PI (the order is no longer displayed in any alert, and the PI is notified of the order cancellation via email).
- **Cancel & Return to Home Page** – Cancel all the changes you have just made to the order and return to your home page – in case you want to view and edit the order later on (the order does not change its location and is displayed in the **Alerts -- New Standing Orders** section).

When the Animal Buyer places the order with the vendor, the order moves to **Alerts – Animal Standing Orders Due**.

Under the Standing Order Delivery Schedule section, you will notice that Darwin automatically puts the Plan Status as “**on hold**”. Up until this point, the standing order is a Plan, no orders have been created and the protocol has not been debited.

Standing Order Delivery Schedule

Enter the delivery schedule for this Standing Order

Plan Name:

Plan Status: **OnHold** ▼

Standing order initial expected delivery date: 01/14/2013

Standing order Expiration Date: 04/10/2013

Standing order occurs weekly: ☐ Every 0 Week(s) Mon ☐ Tue ☐ Wed ☐ Thurs ☐ Fri ☐

Standing order occurs monthly: ☒ Second Tuesday Every 2 Month(s)

Limit number of shipments to: 5

Requestor Info:

Each shipment needs to be accepted before moving to the **Alerts – Placed Orders** and to continue the process.

*In the example below, the **Next Plan # 1** is the first shipment in queue for order #V007919*

ALERTS -- ANIMAL STANDING ORDERS DUE										
Next Plan #	Order #	Principal Investigator	Expiration Date	SO Expire Date	Description	Expected Date	Protocol No	Other Source	Requestor	Vendor Name
1	V007919	Rvh, Investigator	12/01/2015	08/02/2013	Experimental Group	07/09/2013	2012-7267		Rvh, Investigator	Charles River Laboratories

If an upcoming shipment is neither accepted nor skipped, it moves to the **Alert – Lapsed Standing Order** on the expected delivery date.

To see more definitions on the standing order alerts, go to [Appendix B: Standing Order Alerts](#).

Each upcoming shipment of a standing order appears here a set number of days prior to expected delivery date. When accepted by either the PI or Animal Buyer, it moves to **Alerts -- Placed Orders** for PI

If the shipment is skipped, it no longer appears in the alerts. If the PI confirms the shipment to be skipped, the ABUYER will receive an e-mail notification.

Animal Buyer Processes the Standing Order for Shared Housing

To view the alerts for shared housing, the Host Animal Buyer must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

- From the Host Animal Buyer Darwin Home Page, switch to the Home (MAC) FACC site from TOC.

Home Page

Alerts...
[Orders New](#)
[Animal Orders](#)
[Sites](#)
 MAC FACC
 RVH FACC
[Roles](#)
 ASUPER
[Change Password](#)

ALERTS -- NEW ANIMAL ORDERS

Source	Vendor	Other Source	Order #	Order Date	Requestor
Vendor Purchases	Charles River Laboratories		V007826	01/11/2013	Investigator2, Mac

ANIMAL ORDERS
[Create a New Animal Order](#)
[Create a New Standing Order](#)
[Requisition Reports](#)
[Vendor Reports](#)
[Create a New Animal Order From Template](#)
[Auto Receive Animal Shipments](#)
[Requisition Search](#)
[Setup Vendor](#)
[Setup Species](#)
[Setup Facilities & Rooms](#)
[Standing Order Search](#)
[Animal Receipt Reports](#)
[Reconcile Vendor Invoices](#)

Host facility ABUYER
 Home FACC site

The example above shows that the Host facility ABUYER (*Rvh Abuyer*) from the RVH changed his role to MAC:ABUYER and the order request is displayed in the **ALERTS – NEW ANIMAL ORDERS**

5. From the Home (MAC) Facility Darwin Home Page, click the order number under the **Alerts -- New Animal Orders** section.
6. The Create **New Animal Order > Order Line Detail** page opens. Under the **Item Information** section, modify all the required fields (*).
 - For the **Per Diem Account** section, choose any per diem account. The per diems of the Home FACC site will be displayed, and they will not be processed through the Home facility .Animal order will be charged (if required) via service charges from the Host facility to the PI.
 - If the Facility Supervisor did not enter the room #, the Animal Buyer must enter “TBD”. (actual room number will be addressed when you create the quick cards)
 - **Do not enter any Item Pricing.** All transport related to cost should be done via service request.

Accepting Standing Order Shipments

Standing Order Shipments must be accepted to become “active” and move to the **Alerts – Placed Orders**.

The following steps describe how to accept or skip the standing order:

1. On the home page, click on an order from the **Alerts -- Standing Orders Due** section.

ALERTS -- ANIMAL STANDING ORDERS DUE							
Next Plan #	Order #	Principal Investigator	Expiration Date	SO Expire Date	Description	Expected Date	Protocol No
	V007920	Rvh, Investigator	12/01/2015	07/19/2013	Study #110	07/09/2013	2012-7267

ALERTS -- PLACED ORDERS					
Source	Vendor	Other Source	Order #	Order Date	Placed On
Vendor Purchases	Charles River Laboratories		V007919-1	07/02/2013	07/02/2013

2. The **Create Animal Order> Order Line Detail** page opens.

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	VC007822
Order Date	01/07/2013
Principal Investigator	Investigator1, Rvh
Protocol No	2013-7276
Expiration Date	04/10/2013
Species	Rats

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Item #.	Delivery Date	Qty	Per Cage	Category of invasiveness	Strain	Weight	Age	Sex	Facility	Room No	Per Diem	Per Diem Account	Remarks	Purchase Account
1	01/14/2013	9	3 A		Zucker	200g		M	RVM Animal Facility-TEST	TestB	Test Rat Conventional Cage	1114		1114

Animal Source Info

Animal Source: Vendor Purchases

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	Charles River Laboratories
Notes to Vendor	
Purchase Order Number	
Vendor Information	

Order Notes

Notes to Animal Technicians	
Shipment Information	

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Abuyer, Rvh
Requestor Phone	111-1111
Requestor Email	rvhbuyer@mcgill.ca

Accept Shipment Skip Shipment Cancel & Return to Home Page

3. Choose one of the following buttons:

- Accept the shipment by clicking **Accept Shipment**. This creates the first shipment on the plan and places it in the **Alerts – Placed Orders** section
- Skip the shipment by clicking **Skip Shipment**.
- Return to the home page by clicking **Cancel & Return to Home Page**.

When an incoming standing order shipment is accepted, it becomes an order and moves to **Alerts -- Placed Orders**. At this point, it is treated like a regular order. The order number is the same as a regular vendor purchase number, but has a cumulative numerical suffix -1, -2, -3 etc. after the number, indicating the shipment number.

If the shipment is skipped, it no longer appears in the alerts. If the PI confirms the shipment to be skipped, the ABUYER will receive an e-mail notification.

Animal Buyer or PI Accepts or Cancels Standing Orders for Shared Housing

To process orders for shared housing, the Host Animal Buyer must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page. The Accept or Skip Standing order is done as regular process (Refer to [Accepting Standing Order Shipments](#))

Order Delivery Schedule

When either the PI or the Animal Buyer accepts an incoming standing order shipment, it becomes an order and moves to the **Alerts -- Placed Orders** . At this point, it is treated like a regular order. The order number is the same as a regular vendor purchase number, but has a -1, -2, -3 etc. after the number, indicating the shipment number.

Once order is on the **Alerts -- Delivery Schedule**, the Animal Buyer must prepare the cage cards. See [Cage Cards Management \(Darwin Desktop\)](#).

Note

For the next reoccurring standing order shipment, it is indicated by an increasing number (e.g.V000652-1, V000652-2) and it will appear in the **Alerts -- Standing Orders Due**. At this point, the order is a plan and needs to be accepted before it goes to the **Alerts -- Delivery Schedule**. To see more definitions on the standing order alerts, go to [Appendix B: Standing Order Alerts](#).

Order is on Delivery Schedule for Shared Housing

To view the alerts for shared housing, the Host Animal Buyer must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Note

Since the facility is NOT barcoded, the Animal Buyer can receive the animals without printing the cage cards. The printing of cage cards will be done via quick cards.

Process Received Shipment

Prior to receiving the animals in Darwin, the Animal Buyer will print the cage cards. The receiving process activates those cards so we will tear-off the activation strip and throw it away. The process for receiving standing orders shipment is the same as the regular orders.

On the delivery date, the standing orders automatically move to the **Alerts -- Animal Receipts Due** section on the Animal Buyer's home page.

Select an order from the **Alerts -- Animal Receipts Due** section, select the appropriate receipt option and click **Continue**.

Each option available offers different choices for receipt.

- **Received as Ordered** – With this option, you cannot change the number of animals received, but you can edit most of the other items in the Item Receipt Information section of the **Receive Shipments > Update Receipt Information** page.
- **Partial Shipment Received** – With this option, you can create an additional line item for delivering the remaining animals at a later date. If not, you may credit the protocol.
- **Additional Animals Received** – With this option, you can debit the protocol for the additional animals. **Shipment did not Arrive** – With this option, you can ask for a new delivery date.
- **Cancel Shipment** – With this option, you can credit the protocol.

Process Received Shipment for Shared Housing

To view the alerts for shared housing, the Host Animal Buyer must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Auto Receive Shipments

For more information on how to process the above options, refer to [Process Received Shipment](#).

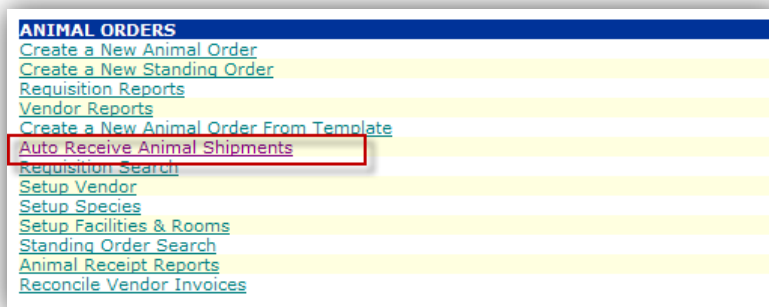
With the Auto-Receive Animal Shipments option, the Animal Buyer and Animal Supervisor can receive multiple shipments– based on the selected filters.

Note

This application only applies to

- Shipments “Received as Ordered”. Shipments with additional or fewer animals ordered must be received individually. Refer to [Process Received Shipment](#)
- Orders in the “Receipts Due” alert, and neither overdue nor future deliveries. These will need to be managed individually.

1. Print cage cards for the orders to be received
2. Select **Auto-Receive Animal Shipments** from the **Animal Orders** section on your Darwin home page.



3. The **Auto Receive Options** page opens. Complete all required fields and then click **Continue**.

A screenshot of the 'Auto Receive Options' form. At the top, it says 'The Auto Receive option will receive all shipments and activate cage cards for bar-coded facilities according to the filters you specify below. Auto receive selects shipments that have been placed with vendor.' Below this is a form with several fields: 'Animal Source' (dropdown), 'Facility Name' (dropdown), 'Vendor Name' (dropdown), 'Other Source' (text input), 'Expected From Date' (calendar icon, date 01/08/2013), and 'Expected To Date' (calendar icon, date 01/08/2013). At the bottom, there is a 'WARNING' box that says 'Before continuing with auto receive, make sure you have reconciled any shipments with receiving problems such as partial and late shipments.' Below the warning are three buttons: 'Continue', 'Clear Form', and 'Return to Home Page'.

4. The **List of Selected Shipments** page opens.

List of Selected Shipments

The following is a list of shipments selected for auto receive. To exclude shipments from being received, check the **Exclude** box next to shipment.

Exclude	Delivery Date	Vendor	Order #	Item #	Principal Investigator	Protocol	Species	Strain	Weight	Age	Sex	Qty	Cages	Facility	Room No	Barcoded?	Per Diem	Per Diem Account	Cards Status
<input type="checkbox"/>	11/09/2012	Charles River Laboratories	V007798	1	Flinstone, Fred	2012-7253	Rats	Zucker			M	10	2	RVH Animal Facility-TEST		Yes	Test Rat Conventional Cage	6789	Printed
<input type="checkbox"/>	11/29/2012	Charles River Laboratories	V007801	2	Flinstone, Fred	2012-7253	Rats	Zucker			F	20	4	RVH Animal Facility-TEST		Yes	Rat conventional	6789	Printed

Finish Auto Receive

Clear Form

Cancel & Return to Home Page

On the **List of Selected Shipments** page, the list of orders meeting your search criteria is displayed. You may choose to **EXCLUDE** a shipment from the auto receive process by selecting it and clicking **Finish Auto Receive**. To auto-receive ALL displayed shipments do not check 'Exclude' - just click **Finish Auto Receive**.

Auto Receive Shipments for Shared Housing

The Host Animal Buyer must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

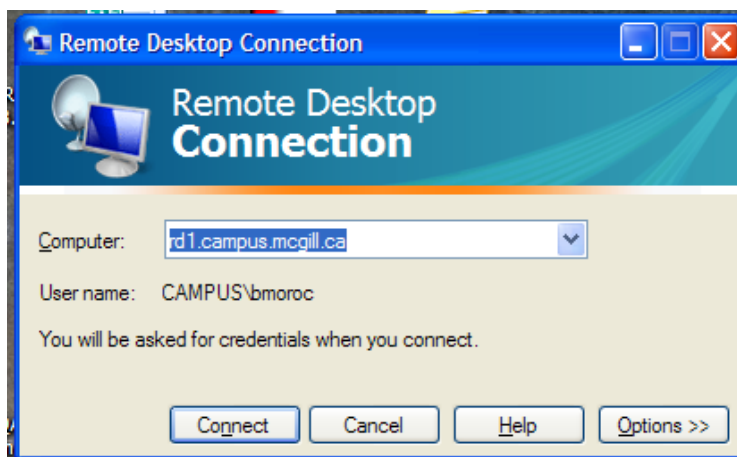
Cage Card Management Functions (Darwin Desktop)

The management of cage card records is critical to the barcode census process. Barcode census differs from a manual census process in that Darwin keeps track of active cage cards as opposed to having a person manually count cages and then enter census activity in a manual census record. Darwin desktop application is used for cage card managements.

Login to Darwin Desktop

To start working with the desktop application, you must have permissions in the security role of ABUYER, BOFC and/or ACCOORD.

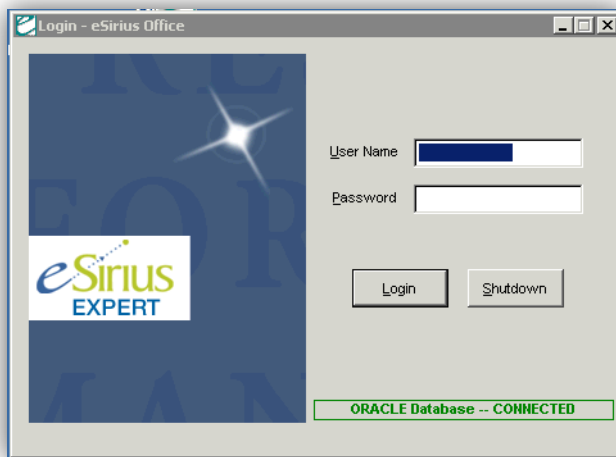
1. From your Computer Desktop, click on the **Start menu> Accessories> Remote Desktop Connection**
2. In the Remote Desktop dialog box, insert the remote desktop address rd1.campus.mcgill.ca then click on **Continue**.



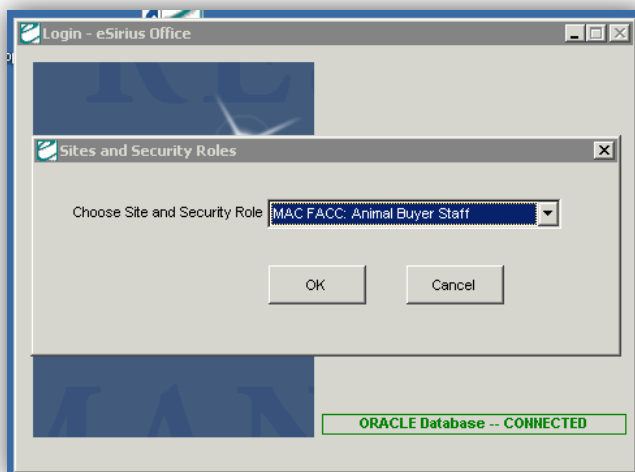
3. Click on **OK**.
4. Select your profile icon **CAMPUS\ McGill Short Username**. You will be prompted to enter your **McGill Password**.
(For more information about the McGill short username and McGill Password, go to <http://kb.mcgill.ca/it/easylink/article.html?id=1025>)



5. From the remote desktop screen, Click the **Esirius** desktop icon
6. In the dialog box, reenter your login information (short Username & password) and click on **Login**.



7. If you are assigned more than one security role/ site, select the appropriate role from the **Sites and Security Roles** drop-down list.



8. Click the **OK** button.



Note

After you have logged in to Darwin Desktop successfully, you can transfer to other assigned security roles from the **File** menu.

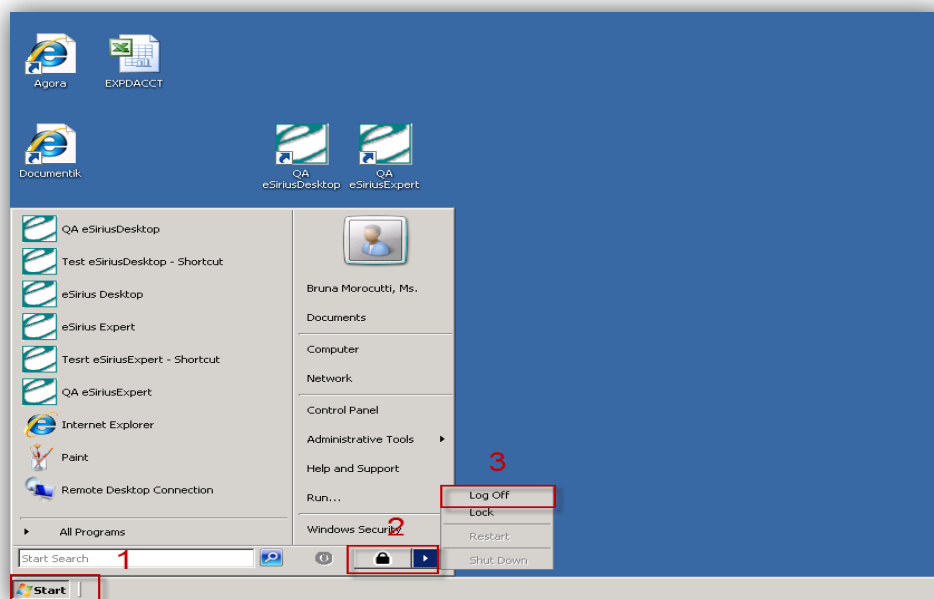


Logout of Darwin Desktop

Regular updates are performed on the Darwin program, requiring a system shut down at out-of business hours.

To avoid subsequent problems after the system is back online, it is important to **LOGOUT** from (not just close) the Remote Desktop Session from the **rd1.campus.mcgill.ca** server.

1. Close all open Darwin Desktop window applications
2. Logout of RD1 Desktop:
 - a. Click on **START**
 - b. Select the arrow next to the lock icon and click **Log Off**



Print Cage Cards

This section applies only to orders processed in Animal facility within the protocol's Home FACC site.

According to the workflow of the [Animal Orders](#), when the Animal Buyer placed the order in the Darwin web application, he/ she will now prepare to print the cage cards. This must be done prior to receiving the animals in Darwin. The [Process Received Shipment](#) activates those cards. The activation strip on the card is removed and discarded, indicating that the card is now active.

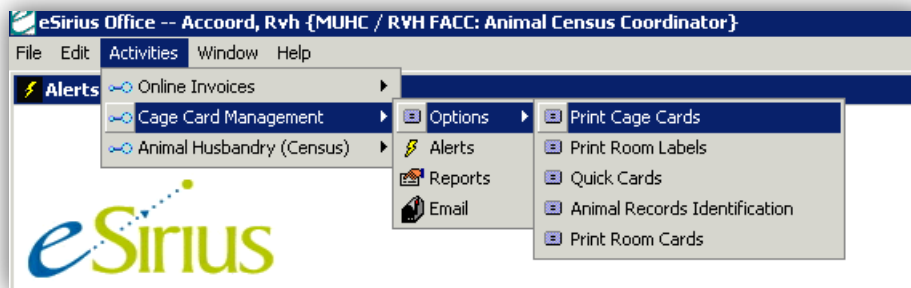


Shared Housing:

Cage Cards for Shared Housing are created using the Quick card function in Darwin desktop. This feature is only available to the ACCOORD role (refer to the Darwin for the [Animal Census Coordinator Office User](#) manual)

To Print Cage Cards:

1. After you login, select **Activities > Cage Card Management > Options > Print Cage Cards**.



The **Print Cage Cards** dialog appears.

Print Cage Cards

Print Cage Cards -> Choose Option
Choose one of the following options:

- Print cards for a selected Delivery Date Range *
- Print Cards for selected Order Number and/or line item
- Print active cards for selected Protocol Number
- Print cards for selected Range

From Date: 07/01/2013 To Date: 07/25/2013

Order # Item #

Protocol #

From Card Id To Card Id

Print Cage Cards -> Choose additional filters
Choose these additional filters if you are printing cards for delivery date range or a specific animal order.

Animal Source Facility

Exclude deliveries with cards already printed? Room Order Status

Exclude cards that have been printed?

Print Cage Cards -> Choose Output Options

Use this card layout * Layout

Sort By Order Number

Number of Labels to Skip

* Required Fields Print Cards Clear Form

- In the **Print Cage Cards > Choose Option** section, choose one of the options for printing the cards and depending on which option is selected, you need to know the delivery date range, order number, protocol number, or card Id range.
- In the **Print cage cards> Choose Additional Filters** section, you may select additional filter for your query.

Print Cage Cards -> Choose additional filters
Choose these additional filters if you are printing cards for delivery date range or a specific animal order.

Animal Source Facility

Exclude deliveries with cards already printed? Room Order Status

Exclude cards that have been printed?



Order Status: All cage cards will be printed according to your specifications, including cancelled orders. Use the Order Status drop-down list to narrow your search (e.g. Open orders only)

Exclude Deliveries with cards already printed?: Select this option if you want to exclude cards that have been already printed. *For example, cards were printed on Monday for the week delivery range. To avoid duplicate prints using the same Print options on Wednesday, the Exclude Deliveries with cards already printed is selected and only the remainder will be printed.*



Exclude cards that have been printed?: Select this option if you want to exclude cards that have been already printed.

- In the Print **Cage Cards > Choose Output Options** section, select from one of the card layout options;

Datamax Standard Card - recommended for vendor Orders



STD		Investigator: Investigator1, Rvh
		Protocol #: 2005-7276
* 0 0 0 0 0 7 5 6 2 7 *		Activation Date: # of animals:
		ORDER #: V003694:1
* 0 0 0 0 0 7 5 6 2 7 *		FACILITY: Genome Animal Facility
PI:	Investigator 1, Rvh	ROOM: 2101
CONTACT:	Investigator, Co	PHONE: 514- 111-1111
AUP:	2005- 7276	AUP EXPIRY: 05/01/2013
SPECIES:	Mice	DELIVERY DATE:05/08/2012
SOURCE:	Charles River Laboratories	AGE: 8 weeks
STRAIN:	(G1 x G2) N3	WEIGHT: 15-20g
PER DIEM:	Mice Conventional Internal	SEX: F
REMARKS:		TOTAL/CAGE: 2

Datamax Breeding Card – recommended for breeding cages

Breeding		Investigator: Investigator1, Rvh
		Protocol #: 2005-7276
* 0 0 0 0 0 7 5 6 2 7 *		Activation Date: # of animals:
		ORDER #:V003694:1
* 0 0 0 0 0 7 5 6 2 7 *		FACILITY:Genome Animal
PI:	Investigator1, Rvh	ROOM: 2101
CONTACT:	Investigator, Co	PHONE: 514- 111-1111
AUP:	2005-7276	EXPIRY: 05/01/2013
SPECIES:	Mice	DATE MATED:
♂ ID:	DOB:	STRAIN:
♀ ID:	DOB:	STRAIN:
♀ ID:	DOB:	STRAIN:

LITTER	DOB	# PUPS	DATE WEANED	REMARKS

Datamax Weaning card – recommended for weaned cages

Weaning		Investigator: Investigator1, Rvh	
		Protocol #: 2005- 7276	
* 0 0 0 0 0 7 5 6 2 7 *		Activation Date: # of animals:	
		ORDER #: V003694:1	
* 0 0 0 0 0 7 5 6 2 7 *		FACILITY: Genome Animal Facility	
PI:	Investigator1, Rvh	ROOM:	2101
CONTACT:	Investigator, Co	PHONE:	514- 111-1111
AUP:	2005- 7276	AUP EXPIRY:	05/01/2013
SPECIES:	Mice		
STRAIN:	(G1 x G2) N3	DOB:	03/08/2012
PER DIEM:	Mice Conventional Internal	TOTAL/CAGE:	2

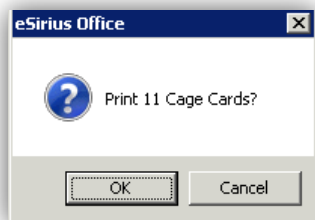
Animal ID	Remarks	Animal ID	Remarks

- Using the **Sort By** drop down list in the **Print cage Cards>Choose Output Options** section, the print output can be sorted by **Order Number**, **Facility/ Room**, **Card ID**, **Delivery date**, **PI** and **Vendor**. Order Number is the default sort selection.

Exclude deliveries with cards already printed?		Room	Order Status
Exclude cards that have been printed?			
Print Cage Cards -> Choose Output Options			
Use this card layout	*	Layout	
		Sort By	Order Number
		Number of Labels to Skip	

Order Number
 Facility/Room
 Card Id
 Delivery Date
 PI
 Vendor

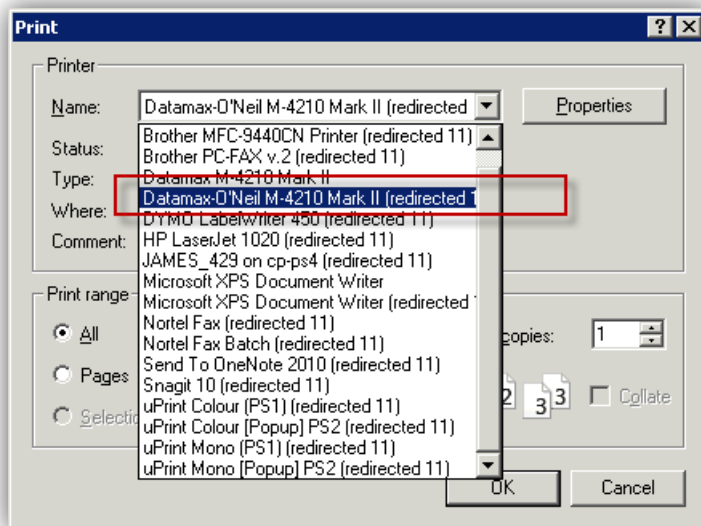
- Click the **Print Cards** button and the Darwin Desktop confirmation message appears.



Note

After an action is requested from Darwin (i.e. print cage cards) the status window appears on the top right hand corner.

- Click **OK** to print cage cards and the **Print** dialog will appear. Select Datamax-O'Neil M-4210 Mark II (redirected) printer.



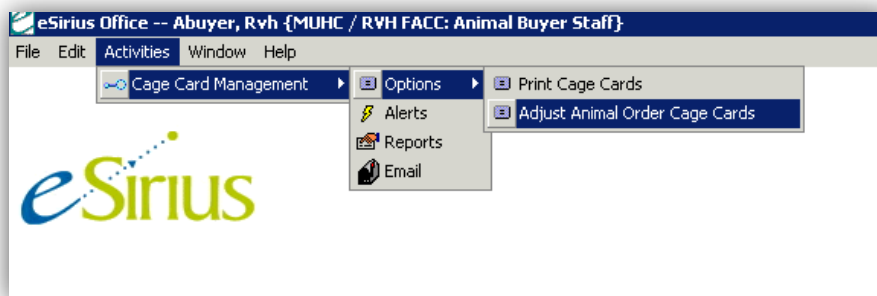
Adjusting Animal Order Cage Cards

With the Adjust Animal Order Cage Cards feature, you can adjust the number of the cage cards you need for the animal order (add additional or request fewer) without changing the actual order quantity.

Note

This procedure cannot be done once the cage cards have been activated or once the order is received.

1. From Darwin Desktop, select **Activities > Cage Card Management > Options > Adjust Animal Order Cage Cards**.



2. The **Adjust Animal Order Cards > Choose Order Options** dialog appears.

A screenshot of the "Adjust Animal Order Cards > Choose Order Options" dialog box. The title bar reads "Adjust Animal Order Cards (Desktop)". The dialog has a header "Adjust Animal Order Cards > Choose Order Options" and a subtitle "Adjust Order Cards - Choose Order Options". Below the subtitle is the instruction "Type animal order number and line item and click Continue." There are three input fields: "Order #" with a blue button to its left, "Item #" with a blue button to its left, and a radio button group with two options: "Additional Cage Cards Needed" and "Fewer Cage Cards Needed". Each input field has a red asterisk to its right, indicating it is required.

Complete the **Order #** and **Item #** fields, select either additional or fewer cards needed, and then click **Continue**.

- a. If you need more cards, select the **Additional Cage Cards Needed** radio button. The **Adjust Animal Order Cards > More Cards Needed** dialog appears. Select the number of cards needed, a cage card layout, and then click the **Finish Request** button.

Adjust Animal Order Cards > More Cards Needed

Adjust Order Cards - More Cards Needed
Type the number of additional cards needed, print options and choose Finish Request.

Order #	V007824	Expected Date	8-10-2013
Item #	1	# Additional Cards Needed	0
PI	Investigator1, RVH	Strain	wild-type
Protocol #	2013-7276	Age	
Protocol Year	1	Weight	10-15g
Vendor	Charles River Laboratories	Sex	Male
Species	Mice	DOB	F.I.
Remarks			
	Per Diem	Test Mouse Conventional Cage	
	Facility	RVH Animal Facility-TEST	
	Room	TestA	

Adjust Order Cards - Print Additional Cards
Select card layout

Print Additional Cards **Cage Layout**

Required Fields Finish Request Clear Form Back Return to Adjust Animal Order Cards Options

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- b. If you need fewer cards, select the **Fewer Cage Cards Needed** radio button. The **Adjust Animal Order Cards > Fewer Cards Needed** dialog appears. Select the card you need to discard and click the **Finish Request** button.

Adjust Animal Order Cards > Fewer Cards Needed

Adjust Order Cards - Fewer Cards Needed
Review and choose Finish Request

Order #	V007824	Protocol #	2013-7276	Expected Date	8-10-2013
Item #	1	Protocol Year	1		
PI	Investigator1, RVH	Vendor	Charles River Labor		

Discard Cards

Adjust Order Cards - Discard Cards
Select cage cards to discard.

Select	Card #	Strain	Sex	Age	Weight	DOB	Per Diem	Facility	Room	Remarks
<input type="checkbox"/>	00000001	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000002	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000003	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000004	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000005	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000006	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000007	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000008	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000009	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	
<input type="checkbox"/>	00000010	Male	Wild-type		10-15g	F.I.	Test Mouse Conventional Cage	RVH Animal Facility-TEST	TestA	

Select All Un-Select All Fill Down Print

Required Fields **Finish Request** Clear Form Back Return to Adjust Animal Order Cards Options

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Note

Printing of the cage cards does not adjust cage animal count. That function must be handled separately by Animal Census Coordinator role. (refer to [Darwin for the Animal Census Coordinator Office User](#) manual)

Requisition Options

For the Animal Buyer, the following requisition options are available:

- Animal Receipt Reports
- Requisition Search
- Standing Order Search
- Vendor Reports

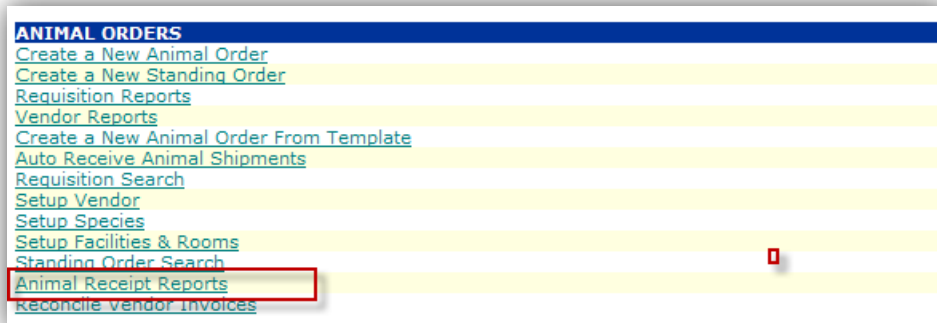
Note

Shared Housing:

The Host Animal Buyer must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

Animal Receipt Reports

1. From your home page, select the **Animal Receipt Reports** option from the **Animal Orders** section.



2. From the **Animal Orders Report Filters** page, select a report to view.

A screenshot of the "Animal Orders Report Filters" page. At the top, it says "To run a report, type in all desired filters, and click report option." Below this is a table with two columns: "Select" and "Report".

Select	Report
<input type="radio"/>	Animal Receipt Report
<input type="radio"/>	Schedule of Arriving Animals
<input type="radio"/>	Total Animals Received by Protocol and Species
<input type="radio"/>	Total Animals Received by Protocol, Species and USDA Category
<input type="radio"/>	Total Animals Received by Protocol, Species and Strains
<input type="radio"/>	Total Animals Received by Vendor, Species and Strains
<input type="radio"/>	Total Animals Received by Species and Per Diem

3. Apply filters to narrow your search, if needed. (See [Appendix C: Search Filters](#) for the definitions.)


Animal Orders Report Filters

	Order Number	Equals	
And	Vendor	Equals	All
And	Protocol	Equals	
And	Species	Equals	All
And	Strain	Equals	All
And	Account	Equals	
And	Order Status	Equals	All
And	Delivery Date Range	Equals	

OR: From To

4. Click the **Run Selected Report** button.

In the example given, the animal receipts report is shown.



eSirius: Animal Requisitions

Animal Receipts Report

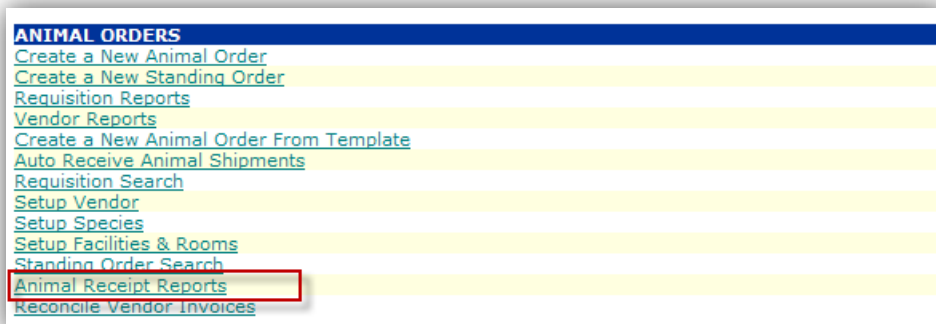
Order #	Item #	Order Date	Protocol	Requestor	Vendor	Species	Date Received	Qty Ordered	Qty Received	Cages Received	Location
N007803	1	12/10/2012	2012-7256	Morocutti, Bruna		Mice	12/10/2012	2	2		RVH Animal Facility-TEST
V007815	1	12/12/2012	2012-7256	Morocutti, Bruna	Charles River Laboratories	Mice	12/12/2012	10	10		RVH Animal Facility-TEST
V007817	1	12/20/2012	2012-7256	Presley, Elvis	Jackson Laboratories	Rats	12/20/2012	10	10		RVH Animal Facility-TEST
V007820	1	01/04/2013	2012-7267	Morocutti, Bruna	Charles River Laboratories	Rats	01/04/2013	5	5		RVH Animal Facility-TEST
V007471	1	10/04/2012	2001-3520	Ochietti, Benoit	Charles River Laboratories	Mice	01/07/2013	9	9		RVH Animal Facility-TEST

INTERNAL USE ONLY

Requisition Reports

A selection of filters provides multiple options for reporting.

1. From your home page, select the **Requisition Reports** option from the **Animal Orders** section.



2. The **Requisition Reports Filters** page opens. Select a requisition report you need to run.
3. From the **Requisition Reports Filters** page, apply appropriate filters. (See [Appendix C: Search Filters](#) for the definitions.)
4. Click the **Run Selected Report** button. The appropriate report will be displayed.



Tip

The Requisition Reports can be used to communicate multiple orders to the Vendor Source



eSirius: Animal Orders

Requisitions Detail Charles River

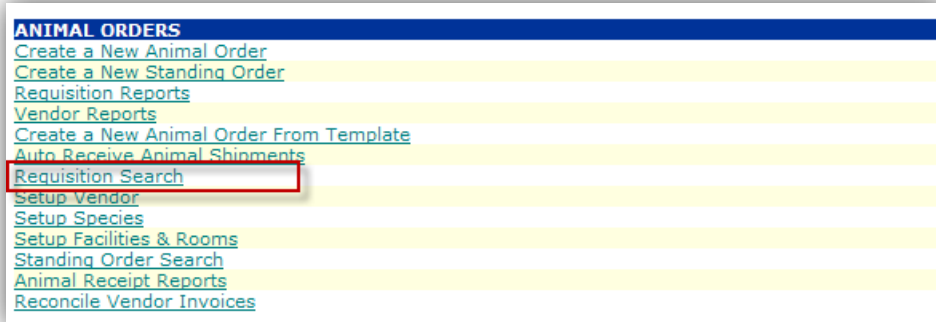
Order #	Purchase Order	Item	Principal Investigator	Purchase Account	Per Diem Account	Protocol	Expected On	Species	Strain Information	Sex	Age	Weight	Qty Ordered	Housing Location	Shipment Information	Shipping Address	Vendor	Notes to Vendor
V007471	AN8270	1	Kremer, Richard	4079	4079	2001-3520	01/08/2013	Mice	Balb/c nude	F	40 days		9	RVH Animal Facility-TEST			Charles River Laboratories	
V007820		1	Investigator1, Rvh	9993	9993	2012-7267	01/08/2013	Rats	Zucker	M			5	RVH Animal Facility-TEST			Charles River Laboratories	
V007821-1		1	Investigator1, Rvh	1114	1114	2012-7267	01/10/2013	Mice	wild-type	M	10 weeks	10-15g	6	RVH Animal Facility-TEST			Charles River Laboratories	
V007824		1	Investigator1, Rvh	1114	1114	2013-7276	01/10/2013	Mice	wild-type	M		10-15g	11	RVH Animal Facility-TEST			Charles River Laboratories	

INTERNAL USE ONLY

Requisition Search

With the **Requisition Search** option, you can search for all your orders.

1. On your home page, select the **Requisition Search** option from the **Animal Orders** section.



2. The **Requisition Search Filters** page opens. Enter all the necessary filters. If needed, you can narrow your search by Vendor/ Source section. (See [Appendix C: Search Filters](#) for the definitions.)

A screenshot of the "Requisition Search Filters" page. The page is divided into several sections, each with a title in blue text: "PI", "Vendor/Source", "Order", "Species", and "Sponsor Filters". Each section contains a list of filter fields with dropdown menus and text input boxes. The "PI" section has fields for "First Name", "Middle Initial", and "Last Name". The "Vendor/Source" section has fields for "Source Type", "Vendor Location", and "Vendor Name". The "Order" section has a complex set of fields including "Order Number", "Order Line Item Number", "Receipt date", "Protocol Number", "Account No", "Order Status", "Facility Name", "Facility Room Number", "Line Item Closed", "Purchase Order Number", "Expected Delivery Date", and "Purchase Account". The "Species" section has fields for "Species Name", "Strain", and "Per Diem Description". The "Sponsor Filters" section has fields for "Sponsor First Name" and "Sponsor Last Name". At the bottom of the page, there are three buttons: "Search", "Clear Filters", and "Return to Home Page".

- Once you have applied all the necessary filters, click **Search**.
- The **Requisition Search Results** page opens. Enter all the necessary filters. If needed, you can narrow your search by Vendor/ Source section. (See [Appendix C: Search Filters](#) for the definitions.)

In the example, the search results were obtained by the Animal Buyer. With the **View Requisition** and **Edit Requisition** buttons, the Animal Buyer can view and edit orders that have not been received.

The PI or PI staff does not have the select radio button and cannot edit orders.

Requisition Search Results

List of Requisition Search

Select	Order No	Item No	Protocol No	Source	Order Date	PO #	Status	Placed On	Other Source	Date Expected	Requestor	USDA Category	Strain	Weight	Age	Sex	Account No	Per Diem Desc	Vendor	Species Group	Species	Facility Name	PI Full Name	Sponsor
<input type="radio"/>	V007820	1	2012-7267	Vendor Purchases	01/04/2013		Placed	01/04/2013		01/08/2013	Morocutti, Bruna	C	Zucker			M	9993	Rat conventional	Charles River Laboratories	Rodents	Rats	RVH Animal Facility-TEST	Investigator1, Rvh	
<input type="radio"/>	V007821-1	1	2012-7267	Vendor Purchases	01/07/2013		Placed	01/07/2013		01/10/2013	Investigator1, Rvh	C	wild-type	10-15g	10 weeks	M	1114	Test Mouse Conventional Cage	Charles River Laboratories	Rodents	Mice	RVH Animal Facility-TEST	Investigator1, Rvh	
<input type="radio"/>	V007822-1	1	2013-7276	Vendor Purchases	01/07/2013		Placed	01/07/2013		01/14/2013	Abuyer, Rvh	A	Zucker	200g		M	1114	Test Rat Conventional Cage	Charles River Laboratories	Rodents	Rats	RVH Animal Facility-TEST	Investigator1, Rvh	
<input type="radio"/>	V007823	1	2012-7267	Vendor Purchases	01/07/2013		Cancelled	01/07/2013		01/09/2013	Investigator1, Rvh	C	wild-type		6 weeks	M	1114	Test Mouse Conventional Cage	Harlan	Rodents	Mice	RVH Animal Facility-TEST	Investigator1, Rvh	
<input type="radio"/>	V007824	1	2013-7276	Vendor Purchases	01/07/2013		Placed	01/07/2013		01/10/2013	Investigator1, Rvh	D	wild-type	10-15g		M	1114	Test Mouse Conventional Cage	Charles River Laboratories	Rodents	Mice	RVH Animal Facility-TEST	Investigator1, Rvh	
<input type="radio"/>	V007825	1	2013-7276	Vendor Purchases	01/07/2013		Cancelled	//		01/15/2013	Investigator1, Rvh	D	Zucker	250-300g		M	1114		Harlan	Rodents	Rats	RVH Animal Facility-TEST	Investigator1, Rvh	

[View Requisition](#)

[Edit Requisition](#)

[Return to Requisition Search Filters](#)

Print Requisition for Vendor Confirmation

The print a requisition for vendor confirmation must be done before you “Place with Vendor”.

Option A: Using Requisition reports

1. To generate a vendor report for ordering, select the **Requisition Detail** report for the selected vendor (e.g. Requisition Detail Charles River) on the **Requisition Reports Filters** page

Select	Report
<input type="radio"/>	Requisitions Detail Covance
<input type="radio"/>	Requisitions Detail Harlan
<input type="radio"/>	Requisitions Detail Laka
<input type="radio"/>	Requisitions Detail Jackson Laboratories
<input type="radio"/>	Requisitions Detail Marshall
<input type="radio"/>	Requisitions Detail Taconic Farm
<input type="radio"/>	Requisitions Detail Memorial University Newfoundland
<input checked="" type="radio"/>	Requisitions Detail Charles River
<input type="radio"/>	Requisitions Detail Chance
<input type="radio"/>	List of Requisitions
<input type="radio"/>	List of Standing Orders
<input type="radio"/>	Requisition Cage Card List
<input type="radio"/>	Requisitions Detail
<input type="radio"/>	Standing Orders Detail
<input type="radio"/>	Templates List

2. Using the filters, specify the
 - vendor name
 - housing facility
 - and the date according to your ordering preference (order date, date placed, date expected, date received)

Note

To minimize shipping errors, it is recommended to generate the report for a single facility.

The shipping address is displayed in the report only if indicated on the Animal Order requisition

Order Filters

	Order Number	Equals			
And	Item Number	Equals	0		
And	Order Status	Equals			
And	Requisition Source	Equals			
And	Order Date	Equals		OR: From	To
And	Date Placed	Equals		OR: From	To
And	Date Expected	Equals	This Week	OR: From	To
And	Date Received	Equals		OR: From	To
And	Closed Items Only?	Equals	<input type="checkbox"/>		

Vendor Filters

	Vendor	Contains	Charles River
And	Other Source	Equals	
And	Location/Building	Equals	
And	Species	Equals	
And	Strain	Equals	

Housing Filters

	Housing Facility	Equals	RVH Animal Facility-TEST
And	Room Number	Equals	
And	Housing Mode/Per Diem	Equals	

Financial Filters

	Purchase Account	Equals	
And	Per Diem Account	Equals	
And	Sponsored by (Last name, first name)	Equals	

PI Filters

	PI First Name	Equals	
And	PI Middle Initial	Equals	
And	PI Last Name	Equals	

Protocol Filters

	Protocol Number	Contains	
And	Protocol Year	Equals	0
And	Project Id	Equals	
And	Protocol Title	Contains	
And	Current Protocol Only?	Equals	<input checked="" type="checkbox"/>

Sort Options


	Sort By 1:	Equals	
And	2:	Equals	
And	3:	Equals	
And	4:	Equals	
And	5:	Equals	

Run Selected Report

Clear Filters

Return to Home Page

3. Click on **Run Selected Report**



eSirius: Animal Orders

Requisitions Detail Charles River

Order #	Purchase Order #	Item	Principal Investigator	Purchase Account	Der. Diem. Account	Protocol	Expected On	Species	Strain Information	Sex	Age	Weight	Qty. Ordered	Housing Location	Shipment Information	Shipping Address	Vendor	Notes to Vendor
V007471	AN8270	1	Kramer, Richard	4079	4079	2001-3520	01/08/2013	Mice	Balb/c nude	F	40 days		9	RVH Animal Facility-TEST			Charles River Laboratories	
V007820		1	Investigator1, Rvh	9993	9993	2012-7267	01/08/2013	Rats	Zucker	M			5	RVH Animal Facility-TEST			Charles River Laboratories	
V007821-1		1	Investigator1, Rvh	1114	1114	2012-7267	01/10/2013	Mice	wild-type	M	10-weeks	10-15g	8	RVH Animal Facility-TEST			Charles River Laboratories	
V007824		1	Investigator1, Rvh	1114	1114	2013-7276	01/10/2013	Mice	wild-type	M		10-15g	1	RVH Animal Facility-TEST			Charles River Laboratories	

INTERNAL USE ONLY

4. The report can be faxed or e-mailed to the vendor.

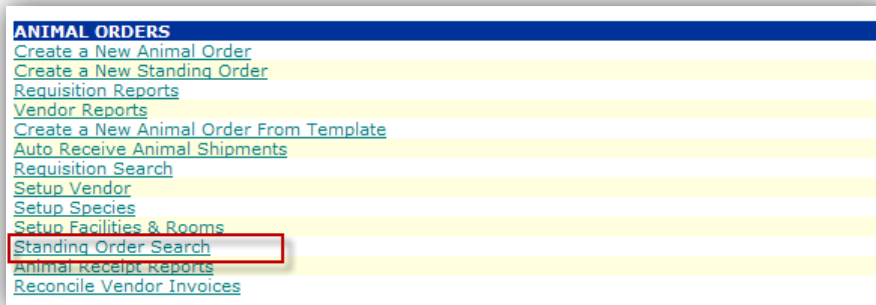
Option B: Using Requisition Search

1. Make note of the order number before you begin the requisition search.
2. On your home page, select the **Requisition Search** option from the **Animal Orders** section.
3. The **Requisition Search Filters** page opens. Under the **Order** section, enter the order number.
4. Click **Search**.
5. The **Requisition Search Results** page appears. Click the radio button to select the order and click **View Requisition**.
6. The Create New Animal Order > Order Line Detail page appears. Click **File** menu and click **Print**.
7. From the **Print** window, select the appropriate Adobe PDF printer option and click **Print**.
8. Save the PDF to your computer and then send it to the vendor by email.

Standing Order Search

Both the PI and the Animal Buyer have the ability to conduct a standing order search. If the standing order has not yet been received, the Animal Buyer is the only role who can view and edit the order.

1. From your home page, select the **Standing Order Search** option in the **Animal Orders** section.



2. The **Standing Orders Search Filters** page appears. Enter your search criteria. (See [Appendix C: Search Filters](#) for the definitions.)

Standing Orders Search Filters

Enter any combination of search filters and click **Search**

PI

	First Name	Equals	
And	Middle Initial	Equals	
And	Last Name	Equals	

Standing Order Filters

	Standing Order Number	Equals	
And	Order Status	Equals	
And	Order Name/Description	Equals	
And	Order Expiration Date	Equals	
And	Next Shipment Date	Equals	
And	Last Shipment Date	Equals	
And	Open Order Status	Equals	<input type="checkbox"/>

Vendor Filters

	Vendor Name	Equals	
And	Purchase Order Number	Equals	

Protocol Filters

	Protocol Number	Equals	
And	Protocol Status	Equals	

Facility Filters

	Facility Name	Equals	
And	Room Number	Equals	

Species

	Species Name	Equals	All
And	Strain	Equals	All
And	Per Diem Description	Equals	All

Search Clear Filters Return to Home Page

- Once you have applied all the necessary filters, click **Search**.
- The **List of Standing Orders** page opens.

In the example, the search results were obtained by the Animal Buyer. With the **View Standing Order** and **Edit Standing Order** buttons, the Animal Buyer can view and edit, respectively, a standing order and that will impact shipments that have not yet been created (accepted). To edit a shipment that has been accepted, use **Requisition Search > Edit Requisition**.

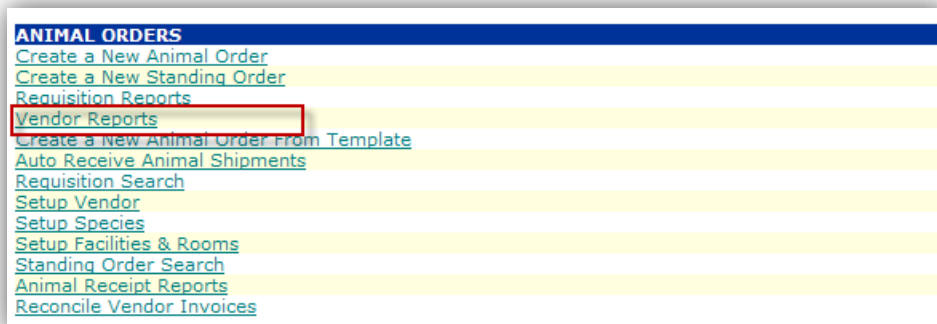
PI or PI staff do not have the select radio button and cannot edit standing orders.

List of Standing Orders

Select	Order #	Order Status	Description	Expires On	Next Shipment	Last Shipment	PI	Phone	Email	Protocol #	Year	Protocol Status	Vendor	PO #	Order Status
<input type="radio"/>	V007821	Active		03/29/2013	01/16/2013	//	Investigator1, Rvh	5141111111x11111	rvh.investigator1@mcgill.ca	2012-7267	1	Approved (w/o Stipulation)	Charles River Laboratories		Placed
<input type="radio"/>	V007822	Active		04/10/2013	03/12/2013	//	Investigator1, Rvh	5141111111x11111	rvh.investigator1@mcgill.ca	2013-7276	1	Approved (w/o Stipulation)	Charles River Laboratories		Placed

Vendor Reports

- Select the **Vendor Reports** option from the **Animal Orders** section of your home page.

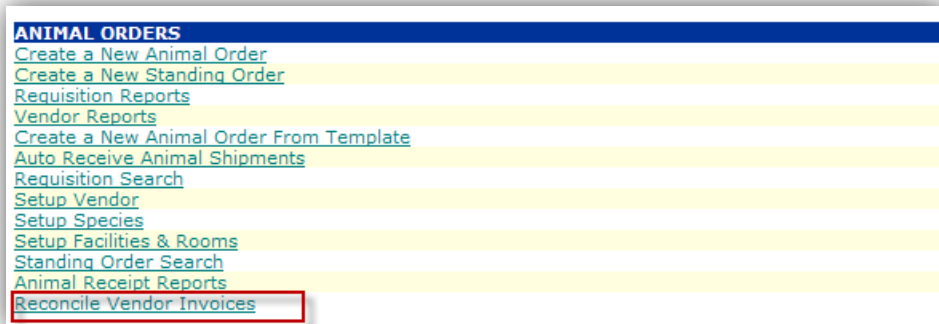


- The **Vendor Reports Filters** page opens. Choose the type of vendor report you would like to run and enter the necessary filter. (See [Appendix C: Search Filters](#) for the definitions.)
- Click the **Run Selected Report** button.
- On the **Vendor Reports Filters** page, the two report types are available:
 - Animal Vendor Listing
 - Blanket Purchase Orders

Reconcile Vendor Invoices

The **Reconcile Vendor Invoices** option may be assigned to the office users.

1. Select **Reconcile Vendor Invoices** from the **Animal Orders** section of your home page.



2. The **Select Vendor** page opens.

A screenshot of a web form titled "Select Vendor". Below the title is an instruction: "Select vendor from list and enter vendor invoice number and click **Continue**." The form contains two input fields: "Vendor Name" which is a drop-down menu, and "Vendor Invoice Number" which is a text box. Both fields have a red asterisk (*) to their right, indicating they are required. At the bottom of the form are three buttons: "Continue", "Clear Form", and "Return to Home Page".

Enter the following information:

- a. Select a vendor from the **Vendor Name** drop-down list.
 - b. Enter the **Vendor Invoice Number**.
 - c. Click **Continue**.
3. The **Select List of Requisitions to Pay** page opens. You will see a list of the orders received but not yet reconciled matching the selected vendor.

Select List of Requisitions to Pay

Choose all applicable shipment for this vendor invoice and click **Reconcile Selected Shipments**. To edit individual shipment prices, click link for desired order number.

Vendor Invoice Information

Vendor Name	Charles River Laboratories
Vendor Invoice Number	658
Invoice Date	<input type="text"/>
Invoice Amount	0.00
Invoice Receipt Date	<input type="text"/>
Invoice Status	<input type="text"/>
Notes	<input type="text"/>

Shipment Items

Select	Order Number	Item Number	PI	Species Name	Strain	Age	Weight	Sex	Quantity Ordered	Quantity Received	Date Received	Purchase Order Number	Item Cost
<input type="checkbox"/>	V002828	1	Investigator	Mice	CD1	21-days	n/a	F	8	8	04/03/2012	AN751	0.00
<input type="checkbox"/>	V002836	1	Rvh	Mice	CD1	6-8 weeks		F	6	6	04/03/2012	AN7750	0.00
<input type="checkbox"/>	V002870	1	Investigator	Mice	C57BL/6	7-8 weeks		F	69	69	04/04/2012		0.00

Reconcile Selected Shipments

Clear Form

Return to Select Vendor

Enter the following information:

- Complete the **Vendor Invoice Information** section.
- Select the shipment(s) to reconcile under **Shipment Items** section.
- Click **Reconcile Selected Shipments**.

Reconcile Vendor Invoices for Shared Housing

It is not applicable to Shared Housing. Animal order related costs must be processed as a service request in the Host Facility.

Cage Card Management

This is a Global Setting reserved for Animal Compliance office ONLY. For modifications to this list, please submit your request to the ACO by email at darwin@mcgill.ca

Protocols

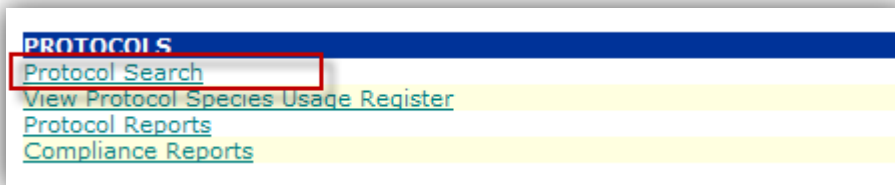


This feature is not available for Shared Housing protocols. A request to obtain Protocol information must be submitted to the protocol's Home FACC administrator.

Protocol Search

To search for a protocol:

1. Click **Protocol Search** in the **Protocols** section on the Home page.



The **Protocol Search Filters** page opens.

The filters are by

- Species
- Protocol
- Approval dates
- Funding
- Type of Animal Use

For example, (see the image on the previous page) to search for a protocol if you have its number:

- In **Protocol Number - Contains**, enter the last 4 digits of the protocol number.

For more information about Search operators see [Appendix C: Search Filters](#).

Protocol Search Filters

PI Filters

	PI First Name	Equals	<input type="text"/>
And	PI Middle Initial	Equals	<input type="text"/>
And	PI Last Name	Equals	<input type="text"/>

Species

	Species Group Name	Equals	All
And	Species Name	Equals	All
And	Category	Equals	<input type="text"/>

Protocol Filters

	Protocol Number	Contains	<input type="text"/>
And	Protocol Year	Equals	0
And	Project ID	Equals	<input type="text"/>
And	Protocol Title	Contains	<input type="text"/>
And	Current Protocol Only?	Equals	<input checked="" type="checkbox"/>

Status Filters

	Protocol Status	Equals	All
And	Status Date Range	Equals	<div> <input type="text"/> <input type="text"/> </div>

Approval Filters

	Approval Date	Equals	<div> <input type="text"/> <input type="text"/> </div>
And	Protocol Expiry Date	Equals	<div> <input type="text"/> <input type="text"/> </div>
And	3rd Yr Full Renewal Due Date	Equals	<div> <input type="text"/> <input type="text"/> </div>

Funding

	Agency Funding	Equals	<input type="checkbox"/>
And	Private/Commercial Funding	Equals	<input type="checkbox"/>
And	Dept., start up or other Funding	Equals	<input type="checkbox"/>

Type of Animal Use Filters

	Purpose of Animal Use	Equals	<input type="text"/>
And	Services-Sentinels	Equals	<input type="checkbox"/>
And	Services- Other	Equals	<input type="checkbox"/>
And	Other (specify)	Equals	<input type="text"/>

Sort Options

	Sort By 1:	Equals	<input type="text"/>
And	2:	Equals	<input type="text"/>
And	3:	Equals	<input type="text"/>
And	4:	Equals	<input type="text"/>
And	5:	Equals	<input type="text"/>

3. Click the **Search** button.

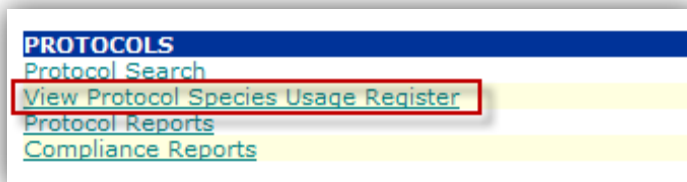
View Protocol Species Usage Register

The Protocol Species Usage Register illustrates the protocol activities (order, wean) in relation to the animal usage.

Note

Automatic e-mail notifications are transmitted to the PI and FACC Coordinator with periodical reminders (30 days) if the protocol register balance reaches or exceeds 70% usage.

1. Click **View Protocol Species Usage Register** in the **Protocols** section on the Home page.



The **Protocol Search Filters** page opens

2. On the **Protocol Search Filters** page, enter the Filters and click **Search**

Protocol Species Usage Filters

The View Protocol Species Usage register option provides the capability to search for and display species usage activities (i.e. ordering and receiving) on protocols.
To search, enter all desired filters and click search. A summary results list is displayed from which you may drill down to individual activity details.

PI Filters

PI First Name Equals
And PI Middle Initial Equals
And PI Last Name Equals

Species

Species Group Name Equals
And Species Name Equals
And Category Equals

Protocol Filters

Protocol Number Contains
And Protocol Year Equals
And Project ID Equals
And Protocol Title Contains
And Current Protocol Only Equals

Status Filters

Protocol Status Equals
And Status Date Range Equals

Approval Filters

Approval Status Equals
And Protocol Expiry Date Equals
And 3rd Yr Full Renewal Due Date Equals

Funding

Agency Funding Equals
And Federal/Commercial Funding Equals
And Drop-down or no other funding Equals

Type of Animal Use Filters

Purpose of Animal Use Equals
And Nonresearch/Nonhuman Equals
And Nonresearch Other Equals
And Other Category Equals

Register Filters

To view summary of activities for a given time period, enter a transaction or effective date range.
To view summary of activities for protocols in a certain usage percentage, enter the desired %.
Transaction and effective dates are ignored in this case.

Transaction Date Equals
And Effective Date Equals
And Protocol Usage Percent Equals

Search Return to Home Page Clear Filters

3. The **Protocol Species Register Summary Results** page opens with your search results.

Protocol Species Register Summary Results

Protocol Register Summary Results

Select	Protocol	Protocol Yr	PI	Status	Approved	Protocol Expiry Date	3rd Yr Full Renewal Due Date	Species	Category	Original Auth.	Amend.	Order DB	Order CR	XFR DB	XFR CR	Total
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Mice	D	0	0	0	0	0	0	0
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Rats	A	0	0	0	0	0	0	0
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Mice	C	30000	0	0	0	0	0	30000
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Rats	C	10000	0	-10	5	0	0	9995
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Rats	D	10000	0	-3	3	0	0	10000
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Mice	D	100	0	-11	0	0	0	89
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Rats	C	10000	0	0	0	0	0	10000
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Mice	C	0	0	0	0	0	0	0
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Mice	D	100	0	0	0	0	0	100
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Rats	C	0	0	0	0	0	0	0
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Rats	A	10000	0	0	0	0	0	10000
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Rats	D	0	0	0	0	0	0	0
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Rats	D	10000	0	0	0	0	0	10000
<input type="radio"/>	2013-7278	1	Investigator1, Rvh	Un-Finished	//	//	//	Rabbits	D	0	0	0	0	0	0	0
<input checked="" type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Mice	C	30000	0	-108	100	0	0	29992
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Rats	A	10000	0	-9	0	0	0	9991

View Register Detail for Selected Protocol

Return to Register Search Filters

[View Register Detail for Selected Protocol](#)

[Return to Register Search Filters](#)

This provides a summary of the protocol activity in relation to the species and category. This includes:

Original Auth.: The number of animal approved at full review or renewal of the protocol

Amend: Revision of animals via amendment

Order DB: Animals debited as a result of an animal order or weaned

Order CR: Animals credited as a result of an animal order or weaned

XFR DB: Animals debited as a result of an animal transfer

XFR CR: Animals credited as a result of a transfer

Total: Shows the current balance of authorized animals

- To view the detailed activity, select the appropriate protocol with consideration to the **species** and **category**. Click on **View Register Detail for Selected Protocol**

Protocol Species Register Summary Results

Protocol Register Summary Results

Select	Protocol	Protocol Yr	PI	Status	Approved	Protocol Expiry Date	3rd Yr Full Renewal Due Date	Species	Category	Original Auth.	Amend.	Order DB	Order CR	XFR DB	XFR CR	Total
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Mice	D	0	0	0	0	0	0	0
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Rats	A	0	0	0	0	0	0	0
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Mice	C	30000	0	0	0	0	0	30000
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Rats	C	10000	0	-10	5	0	0	9995
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Rats	D	10000	0	-3	3	0	0	10000
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Mice	D	100	0	-11	0	0	0	89
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Rats	C	10000	0	0	0	0	0	10000
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Mice	C	0	0	0	0	0	0	0
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Mice	D	100	0	0	0	0	0	100
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Rats	C	0	0	0	0	0	0	0
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Rats	A	10000	0	0	0	0	0	10000
<input type="radio"/>	2013-7277	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	//	01/01/2014	Rats	D	0	0	0	0	0	0	0
<input type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Rats	D	10000	0	0	0	0	0	10000
<input type="radio"/>	2013-7278	1	Investigator1, Rvh	Un-Finished	//	//	//	Rabbits	D	0	0	0	0	0	0	0
<input checked="" type="radio"/>	2012-7267	1	Investigator1, Rvh	Approved (w/o Stipulation)	12/01/2012	12/01/2013	12/01/2015	Mice	C	30000	0	-108	100	0	0	29992
<input type="radio"/>	2013-7276	1	Investigator1, Rvh	Approved (w/o Stipulation)	01/07/2013	01/07/2014	01/07/2016	Rats	A	10000	0	-9	0	0	0	9991

[View Register Detail for Selected Protocol](#)

[Return to Register Search Filters](#)

The **Protocol Species Register Detail** page opens. The detailed activity is illustrated. (see next page)

Protocol Species Register Detail

Protocol Info

Principal Investigator	Investigator1, Rvh
Protocol Number	2012-7267
Protocol Title	)))))) Testing 11G by submitting a new protocol with Internet Explorer.
Current Status	Approved (w/o Stipulation)
Approve Date	12/01/2012
Protocol Expiry Date	12/01/2013
3rd Yr Full Renewal Due Date	12/01/2015
Species Name	Mice
Pain Level	C
Current Balance	29992

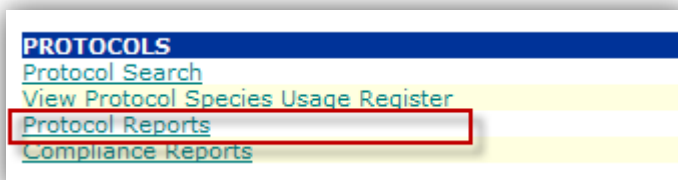
Register Transaction Detail

Trans Date	Trans Time	Effective Date	Category	Type	Source	Reference #	Quantity	User	Remarks
12/14/2012	14:26:19.28	12/01/2012	Authorized	Credit	Submit an Application for a New Protocol		30000	SSMITH16	Opening Balance
01/07/2013	14:09:17.93	01/10/2013	Order Debit	Debit	Standing orders due	V007821-1:	-8	RINVESTIGATOR1	Requested by: Investigator1, Rvh
01/07/2013	15:51:25.1	01/09/2013	Order Debit	Debit	Create New Animal Order (multiple sources)	V007823:1	-20	RINVESTIGATOR1	Requested by: Investigator1, Rvh
01/07/2013	16:15:45.1	01/09/2013	Order Debit	Debit	Create New Animal Order (multiple sources)	V007823:1	-20	ABUYER1	Requested by: Abuyer, Rvh
01/07/2013	16:22:33.00	01/09/2013	Order Credit	Credit	Create New Animal Order (multiple sources)	V007823:	20	ABUYER1	Adjusted order register balance
01/07/2013	16:22:50.1	01/09/2013	Order Debit	Debit	Create New Animal Order (multiple sources)	V007823:1	-20	ABUYER1	Requested by: Abuyer, Rvh
01/07/2013	16:24:22.1	01/09/2013	Order Debit	Debit	Create New Animal Order (multiple sources)	V007823:1	-20	ABUYER1	Requested by: Abuyer, Rvh
01/07/2013	16:24:34.39	01/09/2013	Order Credit	Credit	Create New Animal Order (multiple sources)	V007823:	40	ABUYER1	Adjusted order register balance
01/07/2013	16:28:31.1	01/09/2013	Order Debit	Debit	Create New Animal Order (multiple sources)	V007823:1	-20	ABUYER1	Requested by: Abuyer, Rvh
01/07/2013	16:28:47.21	01/09/2013	Order Credit	Credit	Create New Animal Order (multiple sources)	V007823:	20	ABUYER1	Adjusted order register balance
01/07/2013	16:28:59.02	01/09/2013	Order Credit	Credit	Create New Animal Order (multiple sources)	V007823:1	20	ABUYER1	Order Cancelled By User

[Return to Home Page](#)

Protocol Reports

1. Select the **Protocol Reports** option in the **Protocols section** on your Darwin home page.



The **Protocol Report Filters** Page opens.

2. Select the report type **List of Protocols** and select the appropriate filters for your search. Click on the **Run Selected Report** button

Protocol Report Filters

To run a report, type in all desired filters, and click report option.

Select	Report
<input type="radio"/>	List of Protocols
<input type="radio"/>	List of Protocol Species

PI Filters

	PI First Name	Equals	
And	PI Middle Initial	Equals	
And	PI Last Name	Equals	

Organization/Location Filters

Species

	Species Group Name	Equals	All
And	Species Name	Equals	All
And	Category	Equals	

Protocol Filters

	Protocol Number	Contains	
And	Protocol Year	Equals	0
And	Project Id	Equals	
And	Protocol Title	Contains	
And	Current Protocol Only?	Equals	<input checked="" type="checkbox"/>

Status Filters

	Protocol Status	Equals	All
And	Status Date Range	Equals	From: To:

Approval Filters

	Approval Date	Equals	OR: From: To:
And	Protocol Expiry Date	Equals	OR: From: To:
And	3rd Yr Full Renewal Due Date	Equals	OR: From: To:
And	Active During	Equals	OR: From: To:

Funding

	Agency Funding	Equals	<input type="checkbox"/>
And	Private/Commercial Funding	Equals	<input type="checkbox"/>
And	Dept., start up or other Funding	Equals	<input type="checkbox"/>

Type of Animal Use Filters

	Purpose of Animal Use	Equals	
And	Services-Sentinels	Equals	<input type="checkbox"/>
And	Services- Other	Equals	<input type="checkbox"/>
And	Other (specify)	Equals	

Sort Options

	Sort By 1:	Equals	
And	2:	Equals	
And	3:	Equals	
And	4:	Equals	
And	5:	Equals	

Run Selected Report Clear Filters Return To Homepage

The report in accordance to the search filters is displayed.

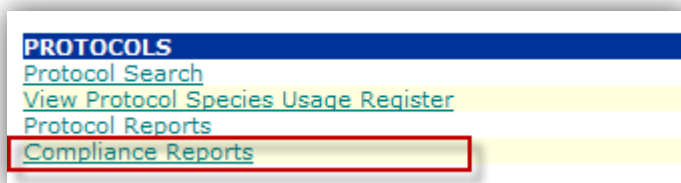
eSirius: Protocols

List of Protocols

Principal Investigator	Function	Department	Organization	Protocol No	Protocol Yr	Version	Protocol Title	Protocol Status	Status Date	Approve Date	Expire Date	Review Date	Submit Date
Investigator1, RVH	Principal Investigator	Animal Resources Centre	RVH-FACC	2012-7267		1	)))))) Testing I1G by submitting a new protocol with Internet Explorer.	Approved (w/o Stipulation)	12/14/2012	12/01/2012	12/01/2015	12/01/2013	12/14/2012
Investigator1, RVH	Principal Investigator	Animal Resources Centre	RVH-FACC	2013-7276		1	)))))) Training/ Testing protocol (RVH).	Approved (w/o Stipulation)	01/07/2013	01/07/2013	01/07/2016	01/07/2014	01/07/2013
Investigator1, RVH	Principal Investigator	Animal Resources Centre	RVH-FACC	2013-7277		1	)))))) protocol 2 reserved for training	Approved (w/o Stipulation)	01/07/2013	01/07/2013	01/01/2014	//	01/07/2013
Investigator1, RVH	Principal Investigator	Animal Resources Centre	RVH-FACC	2013-7278		1	Rabbit antibody production- RVH	Un-Finished	01/08/2013	//	//	//	//

Compliance Reports

1. Select the **Protocol Reports** option in the **Protocols section** on your Darwin home page.



The **Compliance Report Filters** page opens

2. Select the report **Use Locations by Species** and select the appropriate filters for your search. Click on the Run Selected Report button

Compliance Report Filters

To run a report, choose one report from the radio buttons and type in all desired filters, and click 'Run Selected Report'.

Note that some of the report choices below are not functional (for example "Restraint by Species")

☐ Select
 ☐ Report

☐ Use Locations by Species

PI Filters

	PI First Name	Equals	
And	PI Middle Initial	Equals	
And	PI Last Name	Equals	

Species

	Species Group Name	Equals	All
And	Species Name	Equals	All
And	Category	Equals	

Protocol Filters

	Protocol Number	Contains	
And	Protocol Year	Equals	0
And	Project ID	Equals	
And	Protocol Title	Contains	
And	Current Protocol Only	Equals	<input checked="" type="checkbox"/>

Status Filters

	Protocol Status	Equals	All
And	Status Date Range	Equals	<div> <div>From</div> <div>To</div> </div>

Approval Filters

	Approval Date	Equals	<div> <div>OR: From</div> <div>To</div> </div>
And	Protocol Expiry Date	Equals	<div> <div>OR: From</div> <div>To</div> </div>
And	3rd Yr Full Renewal Due Date	Equals	<div> <div>OR: From</div> <div>To</div> </div>
And	Active During	Equals	<div> <div>OR: From</div> <div>To</div> </div>

Funding

	Agency Funding	Equals	<input type="checkbox"/>
And	Private/Commercial Funding	Equals	<input type="checkbox"/>
And	Dept., start up or other Funding	Equals	<input type="checkbox"/>

Type of Animal Use Filters

	Purpose of Animal Use	Equals	
And	Services-Sentinel	Equals	<input type="checkbox"/>
And	Services-Other	Equals	<input type="checkbox"/>
And	Other (specify)	Equals	

Report Filters

	Non-Surgical Procedures	Equals	Analgesia/sedation Anesthesia - Injection Anesthesia - Hypothermia Anesthesia - Inhalant Antibody Production - Monoclonal
And	Surgical Type	Equals	60% pancreatectomy to remove part of the pancreas ABR Measurements Abdominal Exploration - Laparotomy Technique Abdominal Surgery Abdominal Surgery - Telemetric Probe Insertion
And	Surgery Recovery Type	Equals	
And	Drugs	Equals	Pentobarbital (18F) FDG (2R,4R)-APDC (RS)-APICA (monocrystalline iron oxide nanoparticle - MION)
And	Euthanasia Method	Equals	))) other eutha -does it show to FACC and reviewers? Abattoir Anesthetic Overdose As per the Farm's AUP #5309 Barbiturate Overdose
And	Bio-hazard Agent	Equals	1-methyl-4-phenyl 4-Hydroxytamoxif 4-Paraformaldehyd 4T1 5-fluorouracil

The report in accordance to the search filters is displayed.



eSirius: AAALAC Compliance

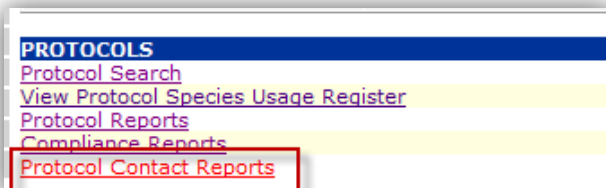
Use Locations by Species

Principal Investigator	Protocol No	Protocol Yr	Species	Facility Name	Room No	Type of Research
Investigator1, Rvh	2012-7267	1	Mice	RVH Animal Facility-TEST	H363Aprocedure	2 Medical relating to diseases
Investigator1, Rvh	2012-7267	1	Mice	RVH Research Lab	Freds Lab	2 Medical relating to diseases
Investigator1, Rvh	2012-7267	1	Rats	RVH Animal Facility-TEST	H363Bprocedure	2 Medical relating to diseases
Investigator1, Rvh	2012-7267	1	Rats	RVH Research Lab	otherPIlab	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Mice	RVH Animal Facility-TEST	H363Aprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Mice	RVH Research Lab	Freds Lab	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Rats	RVH Animal Facility-TEST	H363Bprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Rats	RVH Research Lab	otherPIlab	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Mice	RVH Animal Facility-TEST	H363Aprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Mice	RVH Research Lab	Freds Lab	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Rats	RVH Animal Facility-TEST	H363Bprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Rats	RVH Research Lab	otherPIlab	2 Medical relating to diseases
Investigator1, Rvh	2013-7278	1	Rabbits	MGH Large Animal Facility used by RVH	A9	3 Regulatory testing
Investigator1, Rvh	2013-7278	1	Rabbits	RVH Animal Facility-TEST	H369	3 Regulatory testing

Protocol Contact Reports

The Protocol Contact Report function generates various reports with personnel contact information.

1. Select the Protocol Reports option in the Protocols section on your Darwin home page.



The **Contact Listing Report Filters** page opens

2. Select the type of report you want to generate and select the appropriate filters for your search. Click on the Run Selected Report button

Contact Listing Report Filters

Select Report

☐ Contact Listing
☐ Contact Listing by Protocol
☐ List of Protocols by Contact

Contact Filters

Contact First Name Equals
 And Contact Last Name Equals
 And Contact ID Equals
 And Contact Type Equals
 And Contact Business Role Equals

PI Filters

PI First Name Equals
 And PI Middle Initial Equals
 And PI Last Name Equals

Organization/Location Filters

Protocol Filters

Protocol Number Contains
 And Protocol Year Equals 0
 And Project ID Equals
 And Protocol Title Contains

Status Filters

Protocol Status Equals All
 And Status Date Range Equals OR: From To

Approval Filters

Approval Date Equals OR: From To
 And Protocol Expiry Date Equals OR: From To
 And 3rd Yr Full Renewal Due Date Equals OR: From To

Type of Animal Use Filters

Purpose of Animal Use Equals
 And Services-Sentinel Equals ☐
 And Services-Other Equals ☐
 And Other (specify) Equals

Run Selected Report Clear Filters Return To Homepage

The report in accordance to the search filters is displayed.

eSirius

eSirius: Protocols

Protocol Contact Listing

Investigator Name	Protocol No	Approved	Review Date	Expiration Date	Contact	Active?
Rvh, Investigator	2013-7278	//	//	//	Co, Investigator	Yes
Flinstone, Fred	2013-7300	04/01/2012	04/01/2013	04/01/2015	Douglas, Investigator	Yes
Flinstone, Fred	2013-7300	04/01/2012	04/01/2013	04/01/2015	Mac, Investigator	Yes
Flinstone, Fred	2013-7300	04/01/2012	04/01/2014	04/01/2015	McGill, Investigator	Yes
Rvh, Investigator	2012-7267	12/31/2013	12/01/2013	12/01/2015	Rvh, Investigator	Yes
Rvh, Investigator	2013-7276	01/07/2013	01/07/2014	01/07/2016	Rvh, Investigator	Yes
Rvh, Investigator	2013-7277	01/07/2013	//	01/01/2014	Rvh, Investigator	Yes
Rvh, Investigator	2013-7278	//	//	//	Rvh, Investigator	Yes

INTERNAL USE ONLY

Appendix A: Animal Order Alerts

The following table defines the animal order alerts, who would see the alerts, and who can take action on the order:

Alert	Why a requisition is displayed here:	Who sees it A = 'Always' W = 'Workflow status dependent'	Workflow statuses - indicate who can open the order and take action
New Animal Orders	When the PI or staff member submits a new order to the Animal Office.	PI and PI Staff (A) Facility Supervisor (W) Animal Buyer (A)	Facility Supervisor Animal Buyer
Placed Orders	When the order has been confirmed by the vendor.	PI and PI Staff (A) Animal Buyer (A) Facility Supervisor (A)	Animal Buyer
Wait Listed Orders	When the order has been wait-listed by the vendor.	PI and PI Staff (A) Facility Supervisor (A) Animal Buyer (A)	Animal Buyer
Orders Cancelled by PI	When the PI requests cancellation of a new or placed order.	Animal Buyer (A) Facility Supervisor (A)	Animal Buyer
Delivery Schedule	When the order has been placed, the order will appear in this alert 7 days before the delivery date.	Animal Buyer (A) Facility Supervisor (A) Receiving Technician (A)	Animal Buyer, Facility Supervisor, Receiving Technician
Animal Receipts Due	Order moves from delivery schedule to here on the scheduled delivery date. It stays here until received in the system.	Animal Buyer (A) Facility Supervisor (A) Receiving technician(A)	Animal Buyer, Facility Supervisor, Receiving Technician
Animal Receipt	When an order has been received in Darwin. This alert remains on the PI's home page for a predetermined # of days.	PI and PI Staff (A)	PI and PI Staff
Protocol usage	When animal usage on a protocol reaches 80% (percentage is predetermined in preferences).	PI and PI Staff (A)	PI and PI Staff

Appendix B: Standing Order Alerts

The following table defines the standing order (STO) alerts and who would see the alerts, and who can take action on the order:

Alert	Why a requisition is displayed here:	Who sees it A = 'Always' W = 'Workflow status dependent'	Workflow statuses - indicate who can open the order and take action
New Standing Orders	When a STO is created – it displays here until approved by Animal Buyer.	PI and PI Staff(A) Facility Supervisor (W) Animal Buyer (A)	Facility Supervisor Animal Buyer
Animal Standing Orders Due	Each upcoming shipment of a standing order appears here 7 days prior to expected delivery date. When accepted by either the PI or Animal Buyer, it moves to Alerts -- Placed Orders for PI and Alerts --Delivery Schedule for Animal Buyer. If skipped by PI or Animal Buyer, it no longer appears here (Animal Buyer gets email if PI skips).	PI and PI Staff (A) Animal Buyer (A) Facility Supervisor (A)	PI and PI Staff Animal Buyer
Lapsed Standing Orders	If an upcoming shipment is neither accepted nor skipped, it moves to this alert on the expected delivery date.	PI and PI Staff (A) Animal Buyer (A) Facility Supervisor (A)	Animal Buyer

Appendix C: Search Filters

Any of the following search filters/operators may be used to generate desired search results:

Equals	Search results contain all groups from the first browser window with exactly the same value of the field set on the filters page.
---------------	---

Not Equal To	Search results do not contain groups from the first browser window with exactly the same value of the field set on the filters page
---------------------	---

Like	Search results contain all groups from the first browser window, which contain value that was set on the filters page, in the field (it is part of the field value).
-------------	--

Contains	Search results contain only groups from the first browser window which contain value that was set on the filters page, in the field (it is part of the field value).
-----------------	--

Starts With	Search results contain all groups from the first browser window with field value that starts exactly with the same value that was set on the filters page.
--------------------	--

Sounds Like	Search results contain all groups from the first browser window with the value of field that is nearly to the value set on the filters page (only some symbols in the field could be mistaken).
--------------------	---

Blank	Search results contain all groups from the first browser window with empty value of set field.
--------------	--

And/Or	Enables you to refine or expand the scope of your search
---------------	--

And	Show results containing all of the chosen parameters.
------------	---

Or	Show results containing one of the chosen parameters.
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